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ABSTRACT

Intended primarily for students of the Education for the Retirement Years training workshops (University of Oregon Center for Gerontology), this manual for pre-retirement education facilitators is a practical guide to the methodological concepts discussed and demonstrated during the on-campus training. Chapter 1 offers a brief statement on pre-retirement education content, including references to foundational readings whose broader theoretical and research perspectives can illuminate the content issues for the prospective program leader. Content issues continue to take on definition in the more protracted discussions of methodology in chapters 2-3. Chapter 2 presents a framework for considering the variety of program methods currently applied in pre-retirement education, as well as a general historical perspective on the development of various design concepts. Chapter 3 provides outlines and leader guidance for the two models being demonstrated at the Center--the small-group interaction model and the multi-group workshop. Consideration of different time arrangements and topical sequencing becomes a part of that discussion. Forms and exercises are included. Appendixes include an extensive reading list in the subject matter and an annotated list of films of gerontological interest. (YLB)

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TWO MODELS FOR PRE-RETIREMENT EDUCATION

This manual provides program design information for two interaction methods recommended for pre-retirement education:

A Facilitated Small-Group Model

and

A Multi-Group Reading-Discussion Workshop

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Foreword

This manual for pre-retirement education facilitators is intended primarily for students of the Education for the Retirement Years training workshops conducted at the University of Oregon Center for Gerontology. Offered each summer for several years, the series attracts adult educators, personnel development specialists, community mental health workers, aging programs specialists, community center administrators, and so on. Many of the ERY enrollees return to their respective settings to develop PRE programs for their employees, clients, adult students, or other interested groups. To assist them in those efforts, the manual is prepared as a practical guide to the methodological concepts discussed and demonstrated during the on-campus ERY training. Beyond the ERY enrollees, this material will be of general interest to a wide range of program leaders, trainers, and researchers concerned with pre-retirement education methodology.

In addition to establishing some perspective for the array of short-term educational events we now call "pre-retirement education," the manual's purposes are to identify what seems to emerge as a consistently represented content in that education, to offer a framework for analyzing methodological alternatives, and to outline in detail two specific program models. The two models offer very different kinds of approaches using one or more small participant groups--the first a leader-facilitated interaction concept for a small group, the other a multi-group reading-discussion workshop. The former application was pioneered at UOCG by U. V. Manion in 1969, and the essence of its process has remained central to the ERY training; derivations of Manion's interaction model have been represented in major research studies at the University of Southern California and the University of Oregon. Both the interaction and workshop models are being studied in the continuing RSRPP investigation.

Following the indicated sequence, then, Chapter One offers a brief statement on PRE content; included are references to foundational readings, whose broader theorectical and research perspectives can illuminate the content issues for the prospective program leader. Though the space devoted to content issues here is not extensive, those issues continue to take on definition in the more protracted discussions of methodology in Chapters Two and Three. Chapter Two offers a framework for considering the variety of program methods currently applied in pre-retirement education, as well as a general historical perspective on the development of various

design concepts. Chapter Three provides outlines and leader guidance for the two models being demonstrated at UOCG--the small-group interaction model and the multi-group workshop; consideration of different time arrangements and topical sequencing becomes a part of that discussion. Appendices include an extensive reading list in the subject matter and an annotated list of films of gerontological interest.

For convenience, certain frequently used phrases and common titles may be abbreviated in the text as follows:

PRE	Pre-retirement education
UOCG	University of Oregon Center for Gerontology
ERY	Education for the Retirement Years, a three-course series of training workshops in pre-retirement education, offered each summer at the University of Oregon.
RSRPP	Research Study of Retirement Preparation Programs, a study supported by the National Institute of Mental Health and conducted by UOCG.

I want to express my appreciation to Sheldon Meyer, who spearheaded production of the original RSRPP manual in 1975; the broad call for copies of that document has been added stimulus for this writing. Much of my own material prepared for that earlier work will be reflected here. For the descriptions of certain group activities, I am indebted to U. Vincent Manion (North Texas State University) for permission to use my own materials present in unpublished work under his supervision. I thank Retirement Services Incorporated (Oregon) for permission to use similar materials originally prepared for their copyrighted publications. And, for the many ideas and clarifications that are the fruits of interactions, I want to thank past and present RSRPP staff members--Judith Pierce, Molly Fox, Susan Bettis, and Donna McKenzie.

Special appreciation goes to Ruth M. Brewer, UOCG Librarian, for her compilation of the reading and film lists included in the appendices, to RSRPP Secretary Linda Way Meier for her supervision of the manuscript's preparation, and to UOCG staffers Marian Crocker and Gene Beugler for their thoughtful typing assistance.

James H. Lynch
January, 1978

Chapter 1

Brief Note on Program Content and Objectives

Certainly, the literature addressing retirement issues and pre-retirement education is a rapidly expanding one. The very brief list of references below intends simply to introduce the reader to that literature--and to the foundations of PRE program content--from alternative starting points.

The Atchley, Carp, and Lowenthal works all offer theoretical schemata and conceptual discussion relevant to a retirement construct; the Lowenthal book also illuminates many issues attaching to the use of either a "developmental" or "life-course" perspective as an organizing principle for that construct. Atchley's work is informative in its attempt to pull together the sparse foundations of a sociology of retirement. Carp's book of readings provides the essential collection of ideas from several disciplines.

Hunter's book, perhaps the earliest systematically organized guide of its type, serves both as a manual for the program leader and as resource material for the pre-retiree. The Manion work exemplifies the series of topically arranged booklets--prepared either for direct use by the individual pre-retiree, or as supplementary program materials for the facilitator. And the Rosencranz manual illustrates the university-gerontology context as a research-and-development resource for PRE planning interests (business, government, labor unions, etc.).

Three research directions are revealed in the Greene, Irelan, and O'Meara works respectively. The Greene study, in the tradition of life-satisfaction research, provides highly respected evidence for educational emphases upon attitudinal factors and planning behavior in PRE programming. The Irelan work is important as an example of descriptions based upon national demographic sampling. Finally, the O'Meara study contributes an example of survey research among employer representatives, on the questions of current programming levels and approaches.

With a more subjective flavor, Ingraham offers a unique and compelling collection of observations by retirees about their lives and circumstances.

Atchley, R. S. The Sociology of Retirement. New York: Schenkman, 1976.

Carp, F. M. (ed.). Retirement. New York: Behavior Publications, 1972.

Greene, M., H. C. Pyron, U. V. Manion, and H. Winklevoss. Preretirement Counseling, Retirement Adjustment and the Older Employee. Eugene, Oregon: University of Oregon, Graduate School of Management and Business, 1969.

Hunter, W. W. Preparation for Retirement. Ann Arbor: The University of Michigan, revised 1976.

Ingraham, M. H., and J. M. Mulanaphy. My Purpose Holds. New York: Teachers Insurance and Annuity Association, 1974.

Irelan, L. M. et al. Almost 65: Baseline Data from the Retirement History Study. Wasington, D. C.: U. S. Government Printing Office (HEW Publication No. SSA 76-11806), 1976.

Lowenthal, M. F., M. Thurner, and D. Chiriboga. Four Stages of Life. San Francisco: Jossey-Bass, 1975.

Manion, U. V., C. S. Owen, and J. H. Lynch (eds.). Plan Now for Your Retirement. Eugene, Oregon: Retirement Services Incorporated, revised 1977.

O'Meara, J. R. Retirement: Reward or Rejection. New York: The Conference Board, 1977.

Rosencranz, H. A. (ed.). Pre-Retirement Education: A Manual for Conference Leaders. Storrs: The University of Connecticut, 1975.

Together, these writings suggest a consistent pattern of issues which dominate discussions of content in pre-retirement education. To see how readily the outlines of that content spring forth in relation to the retirement event, one need only ask: "What are the outstanding effects or retirement on our general perspective of the life course?" Four general observations collect those effects:

1. Retirement demarcates one's participation in a fundamental survival activity--income-producing work, via formal separation from the normative social patterns established for that activity. Both internally and externally, this transition marks off what social scientists regard as a major status passage of later life.

2. Retirement symbolizes a major age passage for an individual. Perhaps more than any other single phenomenon, retirement signals one's passage from one life-stage (middle adulthood, or middle age) to another (late life, or old age).

3. Retirement forebodes the necessity (and the opportunity, as well) for a permanent re-distribution of one's available time, and thus signals re-consideration of values derived from chosen uses of time.

4. Related to the time/values question, retirement calls into deliberation structural life-style considerations and choices involving proximity to family and friends, marital role and relationship adjustments, access to interpersonal support systems, life-plan fulfillment, and so on.

All pre-retirement education content can be seen to derive from these four conditions. Consider the very stable pattern of "topics" that make their ways into PRE program literature and agendas:

1. financial matters, income, standard of living, budgets;

2. health management;

3. living arrangements and housing;

4. relationships with other people and social-matrix issues;

5. life-style matters, involving time, leisure, and activities;

6. aging and personal development.

The roots of a topic can be recognized in the four conditions stated above. The questions surrounding "living arrangements," for example, are: (1) questions of financial security (costs of owning and maintaining a home, costs of relocating to pursue an altered life-style, value of property as a major asset, etc.); (2) questions of convenience, safety, and comfort (related to aging realities, the use of time, etc.); and (3) questions of where one wants to be and what one wants to be doing with one's time (questions of time-use, life-style, and so on). Other topics may be similarly related to the four conditions. In this manner, we see that the apparently simple list of program topics is, in fact, an accurate representation of the concerns that call for some preparatory thought and action.

What we now call "pre-retirement education" is an assortment of program concepts addressing that need for preparation. In the present state of the art, almost all of these concepts constitute single, short-term educational events in the lives of the pre-retirees (the variety of methodology is reviewed in Chapter 2). What these programs intend to accomplish is generally set down in reference to three broad purposes:

1. To impart information about issues which become especially pertinent under the influence of impending retirement;

2. To provide awareness and perspective, by connecting the event of retirement to other processes at work in the life cycle and in the world, and by bringing some sense and order to an array of notions (myths, misconceptions, attitudes, etc.) which attach to the subject;

3. To motivate behavior (decision-making and action) that may be described as planning and preparation for life beyond the retirement event.

Many programs that articulate objectives in reference to the more elusive purposes touching on attitudes, awareness, perspective, and behavior stress the importance of the conduct of the educational experience, rather than simply its content; that is, these methods are based on the belief that the learner's experience within the educational process bears significantly upon his or her assimilation of essential new knowledge and perspective. This entire methodological debate is explored in Chapter 2. That material, along with the design concepts in Chapter 3, will considerably amplify the brief outline of content issues undertaken here.

Chapter 2

Pre-Retirement Education: Issues in Nomenclature and Methodology*

This chapter consists wholly of the author's earlier paper of the same title. The chapter's purpose is the development of a conceptual framework within which the reader can recognize and appreciate important differences among the many methods applied in pre-retirement education today. Since its original release, the framework has achieved some utility and currency in both research and training contexts. Tiberi et al (1978) presented a new report based upon final studies in the USCAGC investigation (referenced in Table 1), and the authors have developed their information in terms of the methodological distinctions drawn herein. In the continuing UOCG investigation (Table 1), two of the "process-modes" discussed in the framework here have become the focus of a major study involving programs in 15 community colleges in four northwestern states.

The paper is re-presented here, then, for the purpose of laying down some methodological foundations prior to the discussion of specific program models in Chapter 3.

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*The paper was originally released in conjunction with the 1977 annual meeting of the Western Gerontological Society. It has since been accepted for future publication in Educational Gerontology. For permission to re-print the paper in these training materials, the author is grateful to the publisher of that journal: Hemisphere Publishing Company, 1025 Vermont Avenue, N. W., Washington, D. C., 20005.

The paper's title* embraces the growing language of pre-retirement education (PRE) as an organizing stimulus; certainly, the ultimate interest lies in substantial methodological issues. Apart from the unaddressed questions about who is responsible for such education, and about what broader adult-education issues are suggested in this matter, the immediate fact is that pre-retirement education is generating rapidly expanding activities in three important contexts: (1) the university-gerontology research and training arena; (2) the diverse community-education context; and (3) the employer personnel setting. The writer is concerned principally with the variety of methodology advancing under this PRE banner, and with the need to bring some order to the attendant, proliferating nomenclature.

Herein, pre-retirement education refers to a wide variety of activities which share one characteristic most obviously: with respect to the pre-retiree, these activities constitute single, short-term educational events. Against an as yet unintegrated background of benefits counseling, scattered efforts at follow-on approaches (materials schedules, newsletters, etc.), the on-going resources of the personnel development unit (where one exists), referral, and the

* This writing expands a paper delivered at the Canadian Association on Gerontology's Educational Meeting convened in November, 1976, in Vancouver, British Columbia. It further develops a workshop lecture originally presented in September, 1976, to Texas state-agency personnel officers in Austin, as part of "In-Career Planning for Retirement," a program conducted by North Texas State University's Center for Studies in Aging.

entirely obscure issue of follow-up services after retirement, pre-retirement education programs have moved to center stage. Few of these programs require more than 30 hours of instructional time, and many use less than 20 hours--regardless of the method employed or the sponsoring context. The commanding language forms attending this phenomenon evolve from considerations of delivery formats--specifically, of differences in delivery methodology. We now encounter a growing patchwork of terms used in differentiating PRE models (delivery system concepts). The situation has grown to the point where some sorting is needed for the student, trainer, personnel worker, researcher, and teacher.

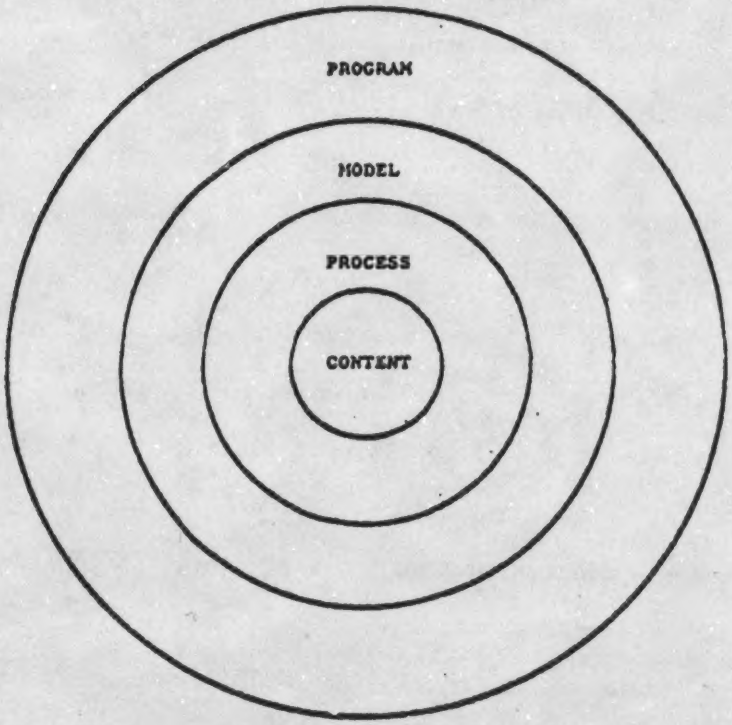
At issue in the needed general discussion on the state of the art are serious questions about purpose, about views of the learner, about understandings of educational methods. With the proliferation of PRE programs and materials in the marketplace, methods must be deliberated in terms of the best understandings we can bring to that task. Finally, the themes of those deliberations must be made visible and meaningful to those many people who find themselves having to make decisions about pre-retirement education for their employees or clients. In the spirit of those sentiments, two schemata follow. The first analysis is organizational, introducing four sets of concepts common to discussion of PRE methodology and establishing some basic terminology. The second broad framework identifies seven methodologically distinct PRE delivery-system concepts (distinguished here as process-modes), differentiates these modes in terms of established methodological principles, and suggests the kinds of PRE models that develop within each mode.

Aspects of PRE Delivery Systems

This first schema originally responded to confusion expressed by students of PRE training. Its purpose is to distinguish certain categories of methodological language and to describe important relationships among those categories. Figure 1, then, orders the relationships among four sets of concepts which regularly surface in discussion of PRE methods. Program, model, process, and content label the four sets--making the matter sound innocent enough. The relational logic of this nomenclature is subsumptive. That is, program refers to the conceptual world at issue; a PRE program includes everything from the publicity to the refreshments; at the level of delivery planning, it attends such matters as identification of target population, recruitment, delivery design, and evaluation. Finally, with respect to delivery, a program is an event. It is not simply a collection of lessons, materials, presentations, and so on; it is the event in which these features become an educational experience pertinent to people looking ahead to retirement.

A model is not an event; it is a delivery design. It is also, intended or not, a manifest view of the relationship between the learner and the learning experience. Model is the term we have come to apply to a recognizable methodological arrangement--a lecture model, for example, or a reading model. Every pre-retirement education program embraces a particular model as a delivery vehicle. A model has nothing to do with recruitment and evaluation and any number or non-delivery program matters; it has solely to do with a

Figure 1. Aspects of PRE Delivery Methodology



selected methodology for promulgating a specific content. In a general arrangement of the four concepts, then, we would say that a program engages its participants via a selected model, which reflects a unique arrangement of process features, whose use is intended to promulgate a content relevant to the task of preparing for retirement (Figure 1).

Process has to do precisely with the techniques, and patterns of techniques, for introducing, developing, and promulgating information (content). It is here that substantial philosophical-methodological arguments are really joined. For processes do not differentiate simply with respect to selected content emphases, or as a function of mechanical preferences and idiosyncrasies; they differ specifically and

consequentially (for the participant) in the postures they establish for the learner within the educational experience itself. In this regard, what we see are certain dominant process orientations (presentation, for example), which develop certain consequent postures among participants (speaker/audience posture, in this case). The writer's term for these orientations and postures is process-mode; this concept collects the characteristic process feature(s) and the related postural quality. A presentation/audience mode, then, is easily recognized as one of the most traditional of forms; here it is designated by its dominant informational technique (presentation) and the associated participant posture (audience). This concept of process-mode becomes foundational to the next section's consideration of specific model differences.

To illuminate the pivotal matter of process further, it will help to approach the schema's logic in the opposite direction--beginning with program content. In pre-retirement education, content outlines follow a well-established pattern. At the core of this content pattern are the following topics: (1) income and finances; (2) health management; (3) living arrangements and housing; (4) relationships with other people and social-matrix issues; (5) life-style matters involving time, leisure, and activities; and (6) enlightened perspectives on aging and development. The broad outlines of this content do not differ significantly from one program to another. Differences, for the observer, become differences in process.

For the methodologist, however, the differences represent choices about the relationship between the content and the learner. Consider

an example: A typical content issue has to do with retirement's windfall of unobligated time. A program might undertake to identify for the pre-retiree numerous ways of occupying oneself in the community after retirement; or it might set about to explore attitudes toward leisure and concerns about life-style changes. In the former case, innumerable ideas about use of time can be introduced and commented upon by guest experts on community recreation, senior center activities, adult education, and so on; lecture becomes the functional process feature; a presentation/audience mode relies heavily on lecture. The writer has observed many such programs, many such presentations. In the second posture, where the participant attitudes and concerns are suggested as important to the content, the design will seek to introduce those matters into the situation; a technique for participant input and deliberation is required. In this case, discussion becomes a functional feature; discussion is important in a number of models mentioned below.

If the example seems an oversimplification at first glance, it nonetheless captures the essence of a central argument among interpreters of PRE programming--that argument having to do with the value of passive-learner process-modes in such a subjective matter as one's preparation and planning for life in retirement. Important research (Greene et al, 1969a) has carefully examined the relationships among attitudes, retirement adjustment, and life satisfaction, and this research has specifically influenced the development and investigation of andragogical delivery concepts in pre-retirement education (Manion, 1972, 1975, 1976; Murray, 1974; Lynch, 1976). Recently, Manion (1976)

has further elaborated his philosophical-methodological arguments about education for "coping," about "prescription" and "pedagogy," and about the inappropriateness of traditional methods to the "problem of planning for retirement."

The intent here is simply to point out that models do become differentiated essentially in terms of dominant methodological orientations toward the particular content/learner interface at issue--in this case, the retirement/pre-retiree interface. The PRE nomenclature emerges largely around this continuing circumstance and its attendant debate. Typically, the terms chosen to represent methods are words designating process features, and so it is with labels given PRE models: reading-discussion model, personal interaction model, lecture model, group discussion model, and so on.

The Nomenclature of PRE Model Concepts

A commonly used organizing principle for frameworks of the type being advanced here has been the "pedagogy/andragogy" construct deriving from Knowles (1970). We are indebted to Murray (1974) for his elaborate application of Knowles' ideas in the discussion of PRE methods, as well as to Manion (1975) for his articulation of the Murray framework in the education of PRE trainers and presenters. The writer applies a version of the Murray framework in Scott and Meyer (1976). An interesting schema by Rosencranz (1975) reflects the same principle at work.

It is not intended herein to apply the pedagogy/andragogy argument in detail, but simply to tease out a theme that does illuminate the

matter of differences among the delivery concepts outlined below. Knowles (1973) provides a concise review of the argument, against an historical background of learning and teaching theory. In general, the distinction involved emphasizes the differences between children and adults as learners. At another level, it stresses the incompatibilities between the historical origins and purposes of traditional teaching postures and the social and developmental circumstance of the contemporary adult learner. Without question, the argument is ignited in any consideration of adult-education content that involves highly subjective dimensions. Sitting down to a formal consideration of one's "third age" certainly embraces such a content. As a measure of PRE methods, then, the pedagogy/andragogy construct can serve as a guide in examination of the relationships between purpose and method.

Essentially, the Murray framework locates various PRE methods along a continuum running from highly pedagogical styles and qualities to highly andragogical ones. Numerous descriptors can be applied to this continuum to clarify the differentiation being advanced. Ingall's (1973) "directing relationship/helping relationship," for example, refers to the poles of the instructional posture. Murray's (1974) "focus on information/focus on self" refers to perceptions of the task/learner interface (relationship). Consider some additional descriptors: passive/active (learner); knowledge of expert/understandings of participant (value orientation); listening and receiving/interacting and helping (learner); telling/facilitating (teacher).

How, then, does the current picture of PRE programming appear when held up to the continuum? The two-year period since Murray's paper has witnessed a major acceleration in PRE activity--on both program-delivery and research fronts. Interest in pre-retirement education has moved well beyond the university-gerontology context and become generally visible in the employer-personnel and community-education arenas. Examining the abundant activity, the writer finds seven general process-modes at work in those PRE methods or models which seem to represent the enduring and possible approaches to the task. The Table of Process-Modes and Models below lists the seven modes, identifies examples of models that develop in each mode, and notes references to research where significant studies have been reported or undertaken.

The arrangement of the modes in Table 1 represents only a general pattern of sequencing against the pedagogy/andragogy continuum. Actually, methods tend to fall decidedly toward one characterization or the other. For example, a "how-to-plan-for-retirement" book, a program of expert lectures, and a highly structured stimulus/discussion model are all fundamentally pedagogical at the task/learner interface. Finer distinctions are not pertinent here, where the purpose should be understood as descriptive and organizational rather than as judgmental.

Pre-retirement education occurs via these seven modes for developing and promulgating information. Almost entirely, what we call pre-retirement education programs can be methodologically located within any one of just five of the listed modes in Table 1. In most cases,

Table 1. Table of Process-Modes and Models

PROCESS-MODE	MODEL OR METHOD	RESEARCH*
Individual/Resource Mode	1. Planning manuals 2. "How-to" books 3. Misc. reading 4. A-V media packages	Informal modes, difficult to investigate. USCAGC
Presentation/Audience Mode	Essentially, the traditional expert-lecture format, though various presentation media may be utilized.	USCAGC; UOCG
Unstructured Stimulus/Discussion	Reading-discussion models, for example, using topic-oriented but informal discussion.	UOCG
Structured Stimulus/Discussion	Hunter's discussion model.	UMIG
	Packaged type: AIM's Retirement Planning Seminar, for example.	
Small-Group Workshop Mode	Lynch's integrated discussion model for leaderless small groups in workshop format.	Lynch-UOCG (in progress)
Facilitated Interaction Group	UOCG's task-oriented interaction model.	UOCG
	Manion's small-group interaction model	USCAGC
Self-Exploration Mode	Personal counseling, life-planning, and human-potential approaches, etc.	

*Note. USCAGC: University of Southern California, Andrus Gerontology Center. See Boyack and Tiberi (1975), report of comparative study of three models.

UOCG: University of Oregon Center for Gerontology. Comparative study of three models presently in progress.

UMIG: University of Michigan, Institute of Gerontology. See Hunter (1968a), report of longitudinal study of a single model.

activities in the individual/resource and self-exploration modes fall outside the concept of programming at work here. With the exception of certain applications of A-V media packages, activities in the individual/resource mode do not ordinarily constitute programs. Much informal activity does occur in this mode, of course; we may give an employee planning guides or occasional reading materials, or we may make available audio-visual packaged information for the employee's voluntary consumption. On the other hand, formalized materials-distribution schedules for pre-retirees or regularly scheduled meetings for viewing A-V packaged information may constitute rudimentary programs. Where A-V packages become methodologically central, they do so within other modes--as input in stimulus/discussion models, or as formalized programs broadcast on public television or via employer closed-circuit video (presentation/audience mode).

The self-exploration mode, falling far to the andragogical end of the continuum, is included primarily to complete the logic of the framework, as well as to acknowledge its philosophical and methodological relevance to the life-span issues associated with retirement. Again, we would not normally characterize activities here as "pre-retirement programs."

Let us look more acutely at the five remaining modes, for they circumscribe the bulk of PRE activity today. One should not construe the possibility of an eclectic mixing across these modes. The distinctions do not represent sets of techniques from which one can select as desired; rather each mode describes a unique relationship between the learner and the educational experience. Below, the modes are discussed and distinguished in reference to four dominant

orientations--the second of these sub-dividing to accommodate the two stimulus/discussion concepts.

1. Presentation/Audience Mode. In this category reside programs which rely almost fully on the traditional lecture, or expert-speaker, technique for informational input, employing it without further involvement of the audience (except for the familiar question/answer feature). The form simply applies the pedagogy we have known since our earliest educational experiences. The lecture series is common to high-interest and vogue offerings in community-education settings (community centers, family mental-health agencies, public libraries, community colleges, and so on). Applied in pre-retirement education, input techniques include guest speakers and filmed presentations, single and multiple presenters and moderated panels, and serial lectures by a convening instructor. The common characteristic of these techniques is the preponderance of one-way communication from the presenter(s) to the audience; a distinguishing corollary of that characteristic is the absence of communication among the audience members.

An important property of the mode is seen in the variety of people and organizations able to implement programs. One need not be a professional educator, counselor, or trainer to design and carry out a series of presentations by other experts. In many cases, the convener's effort can be described as a completely logistical matter. To the community-center director with manifold responsibilities, to the benefits counselor who is abruptly assigned the PRE task, to the adult educator who is responding to some assessment of public

interest--to a variety of potential conveners who have experienced little or no formal training in pre-retirement education, it is understandable that this traditional form would come first to mind.

This same versatility produces some risks. Inexperienced conveners entering into a new content area take great chances in engaging speakers unfamiliar to them. In this subject-matter, particularly, where pre-retirees' attitudes are thought a central influence upon later adjustment, the appearance of a speaker with his or her own negative attitudes, oversimple perspective ("get a hobby"), penchant for nebulous philosophizing or advice-giving, or any of a host of presenter vices can sour a noble program intent. This matter of having to use unfamiliar, untutored presenters is the most frequently mentioned practical problem attaching to the mode.

2. Unstructured and Structured Stimulus/Discussion Modes. The orientation involves direct informational input to a participant group small enough in size to carry on a discussion. The group might be leaderless or it might be assisted by some employer representative or other convening person. Such a group might be found meeting in an employer personnel conference area, at a community college or community senior center, in a hotel as part of a travel-promotion concept, in a private home--the list goes on. Many people not trained as educators, trainers, or counselors can convene programs in these modes, assembling small groups of pre-retirees ostensibly "to discuss" information generated via numerous stimuli--written materials, films, video-tapes, case studies, planning worksheets, and so on. In methodological terms, what may seem a diversity of program styles can be located

here; they share a dominant informational technique (stimulus input) and an organising participant posture (reactive discussion). Beyond these central and definitive commonalities, programs within this orientation are the least formally consistent from one to another. Specifically, they range from unstructured, periodic "parlor" discussion groups to such programs as the highly structured Retirement Planning Seminar (1973, 1976) developed by Action for Independent Maturity, Inc. (AIM).

Within the purview of informal education, we recognise the unstructured mode suggested here as a traditional form--a small group of people assembled for objective discussion; it would seem that every subject under the sun has attracted discussion groups of this type. Here fits the small group of employees meeting in the personnel office to view a film on retirement and share some thoughts on the matter. Here also is the group that meets serially in reference to specific reading materials; the leaderless reading-discussion model being investigated (along with other models) at the University of Oregon Center for Gerontology represents this type of unstructured stimulus/discussion.

Probably, the application of structured stimulus/discussion techniques in pre-retirement education was most significantly advanced by Hunter (1960, 1968a). While his considerations of the nature and importance of discussion as a technique in PRE method may have philosophically foreshadowed certain qualities of the interaction methods noted below, Hunter's own model became a thorough articulation of the structured stimulus/discussion mode. Central to his method has

been the use of anecdotal case studies, filmed vignettes, a variety of paper-and-pencil activities, a book for participants (Hunter, 1968b, 1976), and guest-expert lectures. The "retirement readiness checklists" and filmed vignettes developed by Hunter are well known to students of pre-retirement education.

Another development within this mode has been the "packaged program." Stimulus/discussion features lend themselves to packaged applications, and indeed that direction has become quite visible. Two formats can be seen here. AIM's Retirement Planning Seminar is perhaps the best-known example of the self-contained kit format; the attractively presented package provides materials for participants (readings, worksheets, etc.), other materials for the group's use (hypothetical case studies, filmstrips), and thorough instructions for the leader. The instructions tightly order the sequencing of activities and the distribution of time among the various procedures; discussion directions are prescribed by stimulus suggestions and questions included in the leader materials. To train potential leaders in the use of the package, the AIM organization offers a five-day training program (many of the persons conducting this training for AIM are themselves retirees).

A second kind of packaged approach is seen emerging in the employer setting; it consists generally of a discussion manual and an accompanying employee workbook, intended for use by a personnel development trainer or benefits counselor (who may have little formal preparation regarding PRE content and method). The approach has been seen in the case of large employers whose operations are widely distributed geographically; a single guide and materials concept is distributed from

a central administrative office to personnel units throughout the organization.

The self-contained stimulus/discussion package becomes an attractive option for many conveners who lack foundational preparation in PRE content and method. There can be a price to pay for the convenience, of course. Methodologically naive conveners who must depend heavily upon step-by-step instructions risk an artificial effect in the teaching/learning situation; the artificiality can be heightened by typical stimulus/discussion techniques that impersonalize the subject-matter (the hypothetical case-study epitomizes this tendency).

There has been little rigorous research into the impact of these methods. Hunter's (1968a) longitudinal investigation stands as an early, careful study of a single model. The USCAGC study (Boyack and Tiberi, 1975) did not include a model representing this mode. As noted earlier, a model of the unstructured type is now under investigation in the UOCG study (Scott and Meyer, 1976). Traditional presentation/audience methods, on the other hand, are receiving considerable research attention. Both the USCAGC and UOCG studies have included presentation models in their comparative investigations.

With respect to programs that assemble participants, the writer estimates that the presentation/audience and stimulus/discussion modes account for a clear majority of the activity in pre-retirement education today. Representing a smaller amount of the activity, but having an impact on the analysis of all pre-retirement education, are designs being applied in the remaining modes discussed below. Turning to the workshop and interaction modes, one moves into the area of "process

methodology"--an orientation whose general applications have evolved only within the past twenty-five years. It is fair to say, also, that we turn to models requiring facilitators with specific theoretical understandings, technical expertise, and factual knowledge of the content. Fortunately, the academic gerontological movement of the past several years--certainly because of its natural kinship with adult-education issues--has stimulated considerable interest among prospective facilitators (trainers) from connecting disciplines (counseling psychology, educational psychology, management and organization development, and personnel administration, for example).

3. Workshop Mode. Though the term has become diluted of some of its specificity today, a workshop here involves several small groups of participants, and it arranges process features for generating and promulgating information on both the intra-group and inter-group (workshop) levels. The full workshop replicates a community of shared interests and concerns, while the small discussion groups provide opportunities for establishing experientially the relevance and importance (in retirement planning) of such substantial matters as interpersonal communication, resource identification and use, mutual support systems, assistance in problem-solving, and so on. The distinguishing quality of the mode is the shared, task-oriented participation in the information generating activities.

Programs in this mode are strongly attuned to the pre-retiree as a resource and participant in his or her own educational experience. The small-group activities are designed to call upon the diversity of information, experience, and understanding which the members bring to

the mutual issue of retirement. Participants' attitudes, feelings, and concerns become an acknowledged part of the information being developed. The individual shares in the group's task of developing and considering information. The importance of the small group's work, in turn, is reinforced by the regular reporting of its deliberations to the full workshop.

The writer's "Integrated Discussion Model" (Lynch, 1976) has been a recent, systematic application of the workshop mode in pre-retirement education. The model is intended for use in time-concentrated formats--originally demonstrated in two 1½-day sessions one week apart (approximately 16 hours), and subsequently adapted for a single 2-day program (13 hours). The discussion activity is not individually facilitated by trained leaders; participants, with instructions, are given responsibility for the management of their own groups. A single trainer can comfortably and effectively deliver a program of this type to as many as 50 participants (though, for sex-role resource and certain modeling purposes, male and female co-trainers constitute the recommended staffing). While an underlying pattern of process elements is held constant from topic to topic (linkage, input, task discussion, reporting, linkage), the design mixes a variety of activities in service to those elements: prior reading, in-workshop reading, mini-lectures, guest expert (employer benefits), individual paper-and-pencil exercises, small-group topical discussion, special interest sub-group discussions (men's and women's groups for example), inter-group reporting, group reports to the workshop community, and staff linkage commentary (interpretation, feedback, transition).

Applications in this mode are recent innovations in pre-retirement education, and research regarding outcomes and effectiveness is non-existent. The writer's study among participants in early demonstrations continues in progress. In conjunction with that study, attention is being given the feasibility of short-term training for trainers who are conversant at least with the process principles that obtain (but who may lack any formal preparation with respect to the gerontological foundations at work in PRE program content).

4. Facilitated Interaction Group Mode. Models here derive generally from applications of small-group process theory, especially as interpreted in the supportive, task-oriented interaction group (the label "task-oriented T-group," which was applied to these models early on, is an inappropriate arrangement of terms and should be abandoned). The mode has been highly visible in PRE training and research, primarily for the following reasons: (1) Manion (1972) applied interaction group principles early on in the recent period of accelerating gerontological interest and PRE activity (he began exploring such such models at the University of Oregon in 1969 and subsequently demonstrated them widely); and (2) the spirit of the mode is easily recognized by an entire generation of counselors, educational psychologists, human relations trainers, and personnel workers, whose period of matriculation witnessed truly influential movements in teaching/learning theory (Knowles, 1973, provides a concise review), as well as in the understanding of both the educative and psychotherapeutic functions of human groups and organizations (Bradford, Gibb, and Benne, 1964; Bennis, 1968; Lifton, 1966; Shaffer and Galinsky, 1974; Harper,

1975).

A "group interaction" model, as Manion (1976) prefers to call the method, is distinguished by the presence of a trained facilitator in a small group of participants (6 to 10 members). Programs in this mode may address one such group, or they may involve several small groups in a workshop-like format. While stimulus-input and presentation techniques are generally used, the emphasis is upon shared concerns and experience as a foundation for a mutually supportive, helping group process. The objective for the small group is to develop a mutually based interaction that will enhance self-awareness vis-a-vis retirement and later adult life. Serving that general intent, group activities direct attention toward pertinent attitudes, life-style issues, interpersonal matters such as communication, problem-solving skills and strategies, options and decision-making behavior, and perceptions of intrapersonal resources and goals.

Several program formats derive from the Manion applications. For several years the University of Oregon Center for Gerontology has demonstrated a model designed for classified employees of the University; participants meet for 1½ hours each afternoon for two weeks (10 sessions); the program is observed by students as an aspect of their PRE training. The participant group here is allowed to run up to 12 or 13 in number (including those spouses who attend), and leadership is handled by a male-female co-facilitating team. The co-trainers provide both the factual content (stimulus input) and the process leadership. This model is presented to the students for analysis as a "task-oriented interaction group."

In the USCAGC study (Boyack and Tiberi, 1975), Manion presented a time-concentrated 2½-day program for several small groups in a workshop-like format; in their design and reporting, the authors refer to it as a "group counseling" model, following an earlier designation by Manion (1972). In this model, various input techniques (mini-lectures, films) address relevant information to the full participant audience, but more of the total time is devoted to activities in the small groups. The version presented in the USC study was originally designed for married couples attending together (Manion, 1975), but it has been applied with mixed married/single groups as well. The writer has also applied the model in a 2-day design requiring about 13 hours.

Though these models represent highly developed methodological concepts, their staffing requirements (with respect both to leader/participant ratio and to leader expertise) limit the extent to which they are utilized. In spite of very favorable findings in the USC study, models of the facilitated interaction type will probably continue to experience only limited use. The proven impact of these methods, however, must figure prominently in our consideration of the full range of methodology outlined above.

Conclusion

Activity in short-term pre-retirement education programming is accelerating rapidly. This discussion has intended to collect and distinguish important methodological principles at work in this new education. The goal was to bring some order to these matters, in the form of a broad framework that would provide understandings for the

PRE administrator, educator, researcher, and student. That framework intends to suggest the state of the art now; in the future, certainly, the formats utilized in pre-retirement education will change as the activity becomes integrated within the expanding educational interest in adult life and development.

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Chapter 3

Two Interaction Methods

This chapter presents typical outlines of two methods used in pre-retirement education, both of which develop around small-group concepts. The outlines presented are for: (1) a small facilitated interaction group, and (2) a multi-group reading-discussion workshop. Both the interaction-group mode and the workshop mode were introduced in the preceding chapter's examination of methodological categories. Below, outlines of each method are presented first, with accompanying discussion of general process and sequence matters and comments on alternative time-block arrangements. Teaching objectives for each topic, adapted from Manion's work, are included in the first outline for the interaction method. Detailed discussion of the conduct of various group activities follows the outlines.

Again, this material has been prepared primarily for enrollees in training seminars in pre-retirement education, and it thus assumes an acquaintance on the reader's part with the methodological foundations involved. These outlines, then, do not constitute a handbook for the leader who is generally unfamiliar with the educational concepts and applications at work here.

A Facilitated Small-Group Model

As observed in Chapter 2, the method is distinguished by the presence of a trained facilitator in a group of six to ten members, and by the intended development of the group (symbolically) as a mutual support-system for retirement planning. The method may be applied with a single group, or among several groups simultaneously in a workshop-like format. The group process is often described as "structured," or "task-oriented." Yet the philosophical tone of the process draws heavily upon a sense of mutuality and upon the value of each member's involvement. Activities utilized to promote interaction are designed to develop subjectively pertinent information, rather than simply to stimulate reactive discussion to retirement issues as hypothetical and external matters. Even within the short 12 to 16 hours of a typical program, the fully developed interaction group will exhibit a mood of companionship and intimacy by the program's end.

Taking direction from theory and research about pre-retiree concerns, retiree adjustment and satisfaction, and the education of adults, the interaction method arranges content to emphasize the importance of attitudes (toward aging and retirement), of personal needs and aspirations and goals, and of decision-making and planning behaviors. The process utilizes general informational input techniques (lectures, films, etc.), personal information-generating paper-and-pencil activities, discussion techniques structured upon interactive values (the "helping trio," for example), and the usual supplementary reading materials.

Time Formats for Interaction Models

Originally, the ERY workshop demonstrated a program of ten topic-sessions; the 1½-hour sessions were presented on ten successive afternoons (excluding the weekend between the fifth and sixth sessions). This arrangement, calling for the daily pattern of released time for the University employees participating in the program, is not a highly transferable time format; in this case, it has been an accommodation to the training interests involved. Essentially the same program has been implemented elsewhere in a variety of time formats: (1) a 2-day workshop schedule; (2) four 3-hour evening meetings involving no released time; (3) in an abbreviated 1-day version as the initial, motivational event in a larger package including informational components and counseling resources. In the USC study, Manion's model utilized a 2½-day schedule, beginning with an evening program. In general, the concentrated workshop formats are usable by individual, large employers, who can assemble a sufficient number of participants at a given time and place. The majority of programs for the general public (via community education settings) must rely upon some kind of evening schedule.

By and large, program agenda are developed around the six core topics discussed earlier, with the distinct addition of at least two other topics in interaction models (one at the beginning and another at the end in the list below). A typical eight-topic agenda might read as follows:

1. Pre-retirement Planning: Identifying Retirement Concerns
2. Aging: Myths, Misconceptions, Facts
3. Positive Financial Planning
4. Living Arrangements and Housing
5. Time, Leisure, and Activities
6. Positive Health Management
7. Social and Psychological Development
8. Personal Resources: Personal Values and the Opportunity of Retirement

Many programs deriving from the Manion applications follow the topical sequencing reflected here, with a pattern of movement from the broad, more informationally characterized issues to the individual and personal life-style questions; the symbolism moves from that of "retirement" (external, unknown, fearful) to that of "my retiring" (internal, natural, developmental, potential). Furthermore, the sequence here offers very natural combinations of topics for the time-block arrangements necessary to workshop formats; each successive pair of topics can be combined to fill out a morning or afternoon block.

What may seem a natural option of eight evening meetings for eight weeks is not necessarily the most desirable when employing interaction method. One suspects that certain hypothesized benefits of the method are influenced by such factors as (1) the length of individual sessions, and (2) the length of the period between sessions. Interaction benefits (communication, mutuality, support, etc.) seem to be enhanced as the time in the group is increased (longer sessions, less time between sessions); spreading the relatively short meetings over an eight-week period may well neutralize the qualities which foster those benefits. Schedule variations which have been seen, in addition to the workshop formats noted above, include: (1) four double-topic evening meetings spread over four weeks; (2) double-topic evening meetings twice each week for two weeks (the most concentrated evening schedule seen); and an interesting week-end format convening on Friday evening, and meeting all day on Saturday (morning and afternoon) and again on Sunday afternoon. This latter schedule has been used by employers who wish to support such a program for employees, but whose work activities make released time a great difficulty; the week-end schedule, of course, is not going to be an attractive one to some prospective participants.

Before proceeding to the topic outline, remember that a single facilitator may work effectively with a group of up to 10 or 11 members. As many as 50 to 60 participants may be addressed in the workshop format using several small facilitated groups. When a pre-retiree's spouse is attending, the couple should be kept together in the same small group (the process itself separates spouses from time to time in order to create alternative interaction/information contexts for the individual and the group). In a large group including couples, marrieds attending singly, and single persons, it is normally best to distribute these different factors among the small groups (again, keeping husband and wife together in all cases). However, if only a few marrieds are attending with spouses, it might prove more productive for them if the couples are combined in the same small group(s).

Outline of Topics: Objectives and Activities

The descriptions below may differ in some respects from what enrollees have witnessed in various ERY demonstrations. The material is assembled by topic, and, with the exception of the initial meeting, actual session schedules are not attempted. Details of a typical first session are outlined, because specific introductory procedures for interaction models must be followed. More than anything, the first meeting develops as an orientation to the method and format, to the relaxed interpersonal mode, to the participatory atmosphere. It is also an introduction to the idea of planning (which stands as the conceptual linkage between the subject of retirement and the process of pre-retirement education). Let us proceed through a first session as an example, with reference to objectives, agenda, method, and materials. (Agenda items appearing in BLOCK letters are those described in detail in a later part of this chapter.)

SESSION 1. Teaching objectives for the session would include the following:

1. To describe the program format, and to explain important differences between that format and more traditional teaching activities.
2. To develop a friendly, informal learning environment and tone.
3. To introduce the concept of retirement planning.
4. To develop from research and theory the relevance and value of planning for retirement.
5. To identify from research findings important factors influential in adjustment and satisfaction among retirees.

The initial meeting's agenda might unfold as follows:

7:30 p.m.	Welcome and General Introduction Description of Program Format and Agenda	(15 min)
7:45	(option) Participants complete SENIOR EMPLOYEES QUESTIONNAIRE	(10 min)
7:55	Get-Acquainted WARM-UP Activities (and group formation* if more than one small group involved)	(15 to *25 min)

8:20	(option) Mini-lecture: The Meaning and Value of Planning (or some comparable stage-setting input)	(10 min)
8:30	Break	(10 min)
8:40	Topic: Identifying Retirement Concerns (individual and group RANKING exercise and discussion)	(40 min)
9:20	Summary Linkage and Reading Materials	(10 min)
9:30	Adjourn	

Preparing printed agendas for your participants will be dictated by your own style and circumstances. It is probably best to omit time references on agendas for participants (except for the actual starting and ending times), in order to avoid creating rigid expectations regarding the schedule of events. Participant agendas might show the general flow of events, without trying to include activity names and other facilitator details. Such an agenda for the above session might read as follows:

7:30 p.m. Welcome and Introduction
Get-Acquainted Activity
Lecture: Planning for Retirement
Group Activity: Identifying Retirement Concerns
9:30 p.m. Adjourn

One will sense that the pace does not linger upon any one kind of activity: Lectures are "mini-lecture"; group activities become the most commanding feature. There is, however, an elemental pattern at work continuously throughout the process:

1. Information. Information is developed directly (via lecture, readings, etc.), constructed by the group (such as in the RANKING exercise and other discussion activities), and developed by the individual (in various paper-and-pencil approaches and other guided activities).

2. Discussion. Developed information is systematically routed through a period of guided group interaction.

3. Integration Linkage. The facilitator acknowledges directions in the participant-generated information, provides feedback from pertinent research, and constructs transitional concepts between present focus and future agenda topics.

Where several groups are involved simultaneously, the workshop style adds a very potent group reporting feature; following certain group activities and discussion periods, each group is called to report its deliberations to the full workshop.

Certain features are customarily included in the initial session to set the method among the participants. The facilitator is desirous of orienting members to the method, of reducing tensions and creating a mood of mutuality, and of laying down a conceptual foundation for the whole idea of retirement preparation. Discussion of the method should come early, preferably right after any opening, official activities; without laboring the matter, the facilitator should acknowledge that the method might look different in some respects from past educational experiences; one should be open and engaging about why this is so--about the reasons we believe in participatory educational methods for adults involved in highly subjective subject-matter (see Chapter 2 and various references indicated therein). Mention several of the kinds of activities ahead (readings, lectures, discussion, film), and ask for participant cooperation in giving the method a fair trial. Emphasize the importance of the information and experience the participants have brought to this meeting, and of our belief that each has much to contribute to the learning experience of others in the group.

The warm-up activity (described further on) should come soon after the method-setting remarks; it moves the issue from idea to action and implementation, and, moreover, it provides a relaxed and easy beginning for interaction among participants (immediately acknowledging and modeling the essential process feature of the method).

Generally, appropriate handling of those introductory comments on the method, and of the warm-up activities, suffices as an orientation. For help with the next objective--that of the argument for retirement preparation, the facilitator may turn to any number of source materials. A carefully constructed rationale on the matter can be seen at work in Manion's own series (see RPG Booklet 1: "Retirement: Dreams, Doubts, Strategies"). The rationale draws upon important research findings (which are discussed in the booklet); there is also an uncomplicated decision-making model offered, as well as suggested questions to which it should be applied in personal planning (the questions foreshadow topical areas

that become critical in the overall thrust of research findings about factors affecting retirement adjustment). The booklet's planning worksheets can be incorporated into the program activities if the facilitator wishes. A lecture on the topic, then, might draw heavily from Manion's booklet; there is nothing wrong with participants' both hearing some of the material and receiving it in written form for additional reference.

A 1½-hour session might end at this point; the 2-hour session outlined above would move very naturally into the program's first major group activity (Identifying Retirement Concerns), thereby setting the group interaction mode in the initial meeting.

For the remaining seven topics, objectives and possible activities are outlined below. What follows are not session agendas, but descriptions of topics; they are sequenced as they would customarily appear in a program. Also, agenda options for any topic are shown in the order in which they would be included.

TOPIC 2. AGING: MYTHS, MISCONCEPTIONS, FACTS

Objectives

1. To provide factual information about aging and retirement.
2. To dispel a variety of common myths and misconceptions about aging and retirement.
3. To identify and emphasize the positive realities about later life and development.

Agenda Options

(option) BRAINSTORM "BARRIERS TO PLANNING" (20)
(lack of information will be one of them, providing the linkage to the topic of aging and question of accurate information about aging). With discussion.

Linkage Input: Transitional input to connect the symbolism of retirement and aging, and to suggest the importance of our perceptions of and attitudes toward our own aging.

Standard, brief "ACTS ABOUT AGING" QUIZ (08)

Participants self-score quiz from provided answer sheet (or from RPG Booklet 2 if that procedure is desirable). (08)

Group Discussion: reactions to quiz and answers. (20)

(option) Lecture on life-cycle development, with the purpose of acknowledging the "third age" or the "fourth stage" as qualitatively unique in the life passage, and thus of opening the door to discussion of the opportunities presented by retirement. (20)

TOPIC 3. POSITIVE FINANCIAL PLANNING

Objectives

1. To establish a frame of reference for individual financial planning.
2. To outline a strategy for developing necessary information pertinent to individual planning.
3. To identify the range of resource people and organizations pertinent to financial planning.

Agenda Options

Participants complete FINANCIAL PLANS AND EXPECTATIONS QUESTIONNAIRE. (05)

(option) Film: "Are You Planning on Living the Rest of Your Life?" (Sometimes catalogued simply as "The Rest of Your Life.") Consult reviewer comments in Appendix, as well as in other gerontological film review publications; it is always wise to preview any film before using. This film is somewhat dated, and its appeal may be stronger among certain occupational groups, but it remains one of the few effective video materials vis-a-vis retirement planning issues. (30)

Group Discussion: reactions to film Facilitator works in information from research regarding FP&E questionnaire completed before film. (10)

(option) Individual Activity: participants individually complete a financial analysis worksheet, to begin the planning behavior (members should be told that this personal kind of information will not be used further in the workshop, but that there is some value in filling out the form at this point in the program to stimulate some particular thoughts). There are several versions of such questionnaires in circulation; choose one that is not overly long or complicated, and one that you feel comfortable with. (10)

(option) Lecture: Budget for a Retired Couple (The relevant material is contained in RPG Booklet 3; the budget worksheet for completion beyond the session is also in the booklet.) (20)

Supplementary Materials: Social Security postcard form for requesting individual account information should be distributed; it can be used in discussion following film or at the end of the session. Distribute copies of general Social Security materials, such as "Your Social Security," and "A Woman's Guide to Social Security."

Resource Person: If the participant group derives from a single employer or union context, where other relevant informational or counseling resources exist regarding retirement financial benefits, this topic can be enhanced by the presence of a resource person who represents the benefits program. Individual matters cannot, of course, be greatly illuminated in this way, but the general questions can establish the linkage for the employee to continue beyond the program. Furthermore, it provides an opportunity for the sponsor to become visible in the program--a consideration with important public relations values. (30)

TOPIC 4. LIVING ARRANGEMENTS AND HOUSING

Objectives

1. To introduce the concept of change in living arrangements as a life-long pattern.
2. To identify specific living-arrangement needs.
3. To identify normal changes in living-arrangement needs as a consequence of aging.
4. To facilitate identification of personal preferences in retirement living arrangements.
5. To provide information on living-arrangements patterns among retired persons.

Agenda Options

(option) BRAINSTORM "REASONS FOR MOVING/ REASONS FOR STAYING" With reports and discussion. (The questions appear as a planning aid in RPG Booklet 4; use of the brainstorm information is described later in this chapter.) (20)

(option) Lecture: Progressive Living Arrangements (a life-course perspective on changing needs with respect to living arrangements). (15)

Group Discussion: reactions to lecture; recognition of hopes, needs, plans, alternatives. (20)

Summary Linkage (link housing and financial issues that may require location of additional information beyond workshop).

Supplementary Materials: link participant questions to accessible resources, such as Extension Service, Credit Union, Bank, local RSVP, and so on, depending on the thrust of the question. Distribute one or two good-quality pieces on thoughts about housing: RPG Booklet 4 leans to the personal-philosophical aspects of the issues; publications such as Retirement Living magazine's Retirement Living Guide explore many practical questions.

TOPIC 5. TIME, LEISURE, ACTIVITIES

Objectives

1. To identify activities participants now engage in.
2. To stimulate participants' evaluation of the relative enjoyment of activities they engage in.
3. To inform, from research findings, about how retired people actually spend their time.
4. To facilitate participants' awareness of how different kinds of activities may speak to different human and personal needs (privacy versus social contact, for example).
5. To recognize the inter-relationship between our attitudes toward work and our attitudes toward leisure.

Agenda Options

Participants complete ACTIVITIES INVENTORY (on individual form, or in RPG Booklet 5). (12)

(option) Lecture: work and leisure theory, different satisfactions in activities, community resources for differing uses of time, etc. May conclude with development of list of suggestions from participants on ways of exploring new time uses in their community. (20)

(option) Individual Activity: GUIDED FANTASY DAY. (10)

Group Discussion: Discussion/sharing of fantasy day thoughts and reactions. (This is often an excellent opportunity for some sub-grouping, in order to increase each person's discussion time by reducing the size of groups to three or four; sub-grouping by sex can be productive here also.) (20 to 25)

Summary Linkage and Supplementary Materials: Some materials representing local recreational interests and opportunities highly appropriate here, especially programs oriented toward the senior adult. This is also an opportunity to challenge some new behavior: distribute programs

of local theatre groups (in season), perhaps even complimentary tickets; get suggestions from group about special-interest clubs; mention adult mutual-assistance programs operating in the community; etc.

TOPIC 6. POSITIVE HEALTH MANAGEMENT

Objectives

1. To stimulate awareness of the need for an individual program of preventive health maintenance.
2. To encourage assessment of individual insurance needs and coverage, including investigation of the Medicare coverage and eligibilities.
3. To introduce the concept of mental health, and its relevance to physical health.

Agenda Options

(option) Film: "The Art of Age" (30)
As commented above, one should preview any film before use. This film presents a truly impressive range of qualities associated with aging, in study of four real subjects; however, some find it objectionable because it can evoke feelings about possible physical infirmity with advanced age (depicted in one of the subjects, whose own attitudes, of course, are quite positive and inspiring). If the film is used, it probably should be used first, followed by sufficient discussion time to attend the many feelings and ideas it can evoke. Then the health "brainstorm" can follow, as an upbeat transition to the next topic.

Group Discussion: reactions to film (15 to 20)

Group Activity: BRAINSTORM "POSITIVE HEALTH MANAGEMENT" techniques, behaviors, etc., with reports and general discussion. (15)

Summary Linkage and Supplementary Materials: Health insurance issues will have arisen in the brainstorm discussion, probably. Before leaving the topic, the facilitator should distribute copies of the current

edition of "Your Medicare Handbook," available at the Social Security office, and call attention to important things to know about Medicare benefits. Additional publications on diet, nutrition, and exercise can sometimes be secured from the Extension Service, insurance companies, medical societies, and so on. There is an abundance of quite good material relating to health issues. Don't go overboard, however.

TOPIC 7. SOCIAL AND PSYCHOLOGICAL DEVELOPMENT

Objectives

1. To raise the understanding of existing personal competencies for coping with change (and role changes).
2. To suggest a perspective regarding loss, re-direction, and growth as a lifelong pattern and natural pattern in experience.
3. To make participants aware of the importance of maintaining and expanding social relationships.
4. To recognize that certain qualities of close interpersonal relationships (intimacy, companionship, sexuality) can remain as viable and valuable in later life as they were at earlier times.
5. To suggest possible effects of retirement upon different kinds of relationships.

Agenda Options

In the author's programs, the approach to this topic has become standardized around the AMOEBA lecture, which has been developed upon an original conception by Carl Eisdorfer. The presentation requires about 30 minutes, and it nearly always stimulates a thoughtful, moved demeanor among participants at this point in their program. The amoeba's message is a highly individualized one, and it is perhaps most effectively left with the participant for private deliberation and integration; thus many facilitators prefer <u>not</u> to carry the the ideas directly into a following activity, such as discussion in the small group. (See Appendix A for sample lecture with amoeba drawings.)

Group Discussion: reactions to lecture. (15 to 20)

(option) BRAINSTORM "THE GOOD THINGS ABOUT RETIREMENT" with reports and general discussion. (10 to 15)

Summary Linkage and Supplementary Materials: The "amoeba" supplies many ties to relationship issues, and distribution of some reference like RPG Booklet 6, for reading outside the program, follows naturally here.

TOPIC 8. PERSONAL RESOURCES FOR PLANNING

Objectives

1. To facilitate participant awareness of personal values, and of personal resources important for realizing those values.
2. To promote recognition of how the identified values and resources suggest possible directions in planning and new behavior.
3. To strengthen the belief in beginning the future by selecting an exemplary planning behavior to to carry out beyond the program.
4. To help participants establish a commitment to implement at least one new planning step or new behavior as a result of the program experience.

Agenda Options

(option--if not used earlier) Group Activity: BRAINSTORM "THE GOOD THINGS ABOUT RETIREMENT" with reports and general discussion. (15)

Linkage commentary from brainstorm themes (freedom, time) to planning (05)

Individual Activity: Participants complete PERSONAL RESOURCE INVENTORY. (10)

Group Discussion: Subgroup sharing/discussion of inventories, using trios and quartets; this is an appropriate opportunity for sub-grouping by sex. (25)

Individual and Group Activity: Participants complete COMMITMENT TO ACTION activity. (15 to 20)

Summary Linkage, Materials

Closing Activity: The leader's own style will dictate much here. However, one should acknowledge the participants hard work and cooperation. Many leaders at this point choose to call to the groups' attention the conclusion of the groups as communities, to reinforce the mutuality that individuals so readily built upon in a new experience, and to suggest that they take a few moments to attend to their goodbyes among themselves; the intent is to call attention again, symbolically at least, to the important interpersonal values which the entire process has stressed and utilized, as well as to make specific a sense of closure and transition. (05)

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A Multi-Group Reading-Discussion Workshop*

This title for the method is struck from the idea that the model integrates small-group discussion values, a specific set of reading materials, and certain benefits of a workshop structure. The outline below sets out a likely sequence of activities for a standard 12-13-hour workshop. This example is constructed around four three-hour time blocks, which can be concentrated within a two-day schedule or distributed as four separate meetings. The workshop concept was originally advanced for delivery in concentrated time arrangements. In any case, the individual blocks should not be further divided; each of the three-hour components develops its own integrity and natural stopping point.

***Design concepts and related material regarding this method are adapted (with the authors' permission) from work presently in preparation by U. V. Manion and J. H. Lynch. Their thoroughly developed discussion of the method and its use in pre-retirement education is scheduled for completion early in 1978.**

The model is intended to accommodate large groups (40 to 60 participants, including spouses who can attend). It is equally as serviceable and effective with a group of 20 to 25. Since certain benefits of workshop method derive from the independent activities of several smaller units therein, a sufficient enrollment is needed to develop at least three, and preferably four or more, small discussion groups within the workshop. The author prefers five to seven members in each small group; three married couples make the right-sized couples' group for this method. It would seem that the character of the method risks erosion as overall enrollment declines below 20; certainly, the method cannot be effectively constituted with fewer than three small discussion groups.

The full argument underlying the workshop concept will not be drawn out herein, since it is being fully discussed elsewhere*, and since it will have received considerable attention during the ERY demonstration programs. Essentially, the workshop process is designed to link (microcosmically, symbolically) the individual, the immediate reference group (information network, support system) and the workshop community (world of peers). It is believed that workshop process maximizes appropriate and positive peer identification (with the community of pre-retirees), and, at the same time, enhances individual, personal accommodation of the developmental imperatives subsumed in the retirement issue.

Origin of the Present Design

The author's first analytic outline of the method's structure and process was prepared following an original experiment with the concept in a single-employer (large corporate) setting in the spring of 1976. The concept for the experimental program had derived from work then being done at the University of Oregon Center for Gerontology with a small-group reading-discussion method; that method had been conceived specifically around a new series of retirement preparation materials** published by Manion and associates.

The working outline for the original demonstration, at the employer's request, included 18 program hours (six three-hour blocks), arranged in two week-end segments for delivery one week apart. The schedule for each segment involved a

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*Ibid.

**Manion, U. V., C. S. Owen, and J. H. Lynch (eds.). Plan Now for Your Retirement (Retirement Preparation Guide). Eugene, Oregon: Retirement Services, 1976 (revised 1977).

Friday night block followed by Saturday morning and afternoon blocks. That first use of the method was presented by the author and UOCG's Donna M. McKenzie to a participant group of about 50 (including several spouses of employees). The author's elaboration of the workshop concept (Lynch, 1976), involving the use of individual, small-group and community (workshop) activities in an integrated learning process, grew out of that first interesting experience. In subsequent experiments, it was concluded that the 18 hours was considerably more than needed to achieve the primary benefits which the method seems to bring to the educational intervention at issue here. Since then, the author's work with the model has become standardized around the two-day (four-block) design.

Notes and Definitions

Time Formats: The workshop has been conducted in two-day formats (two mornings and afternoons), as well as in a series of four evening meetings within a two-week period. At RSRPP study is being made of a program of four three-hour meetings over a four-week schedule.

Reading Materials: The outline of a typical workshop below was designed in four time-blocks for delivery in a concentrated two-day program. In that format, the 10 RPG booklets are distributed on the following schedule:

#1 and #3 in advance of the first day (at least one week, not more than three weeks, before);
#2 used within the workshop process, first block;
#7 given out first day for post-workshop reading;
#4 given out first day for overnight reading assignment;
#5 and #9 used within the workshop, second day;
#6, #8, #10 given out second day for post-workshop reading.

The rationale involved in the distribution pattern becomes evident in the outline itself, and the basic idea adjusts readily to formats other than the two-day schedule.

Features of the Method

Each of the workshop activities can be identified under one of the following designations. Analysis of the clock time required by the various activities is included in the outline.

Procedural Activity: Refers principally to opening and closing functions. Sponsor introductions, organizing tasks (such as get-acquainted activities and group formations), and concluding evaluation activities are so designated.

Linkage Commentary or Summary Linkage: Facilitator input which manages the movement of the workshop through its schedule and tasks. Facilitator commentary carefully provides background concepts and transitional linkages throughout the process; it should also provide feedback and support for the participants regarding their work.

Individual Activity: Where participants are involved privately in a task, such as completing a PLANNING AID or other designated exercise.

Discussion Groups: Each participant is a member of a standing group of about eight persons. This designation identifies all activities relegated to that group or to any SUBGROUP thereof.

Read, or Read/Review: Both designations refer to periods when participants privately read and/or review BOOKLETS from the RPG series. "Read/Review" is applied to materials which participants had in their possession prior to the workshop or particular meetings, and which it is presumed they read or skimmed. "Read" is applied to booklets distributed within the workshop process for immediate use.

Reports: Refers to occasions when discussion groups are reporting to the full workshop concerning their deliberations (group reporters make oral summaries), or when the full workshop membership is reporting spontaneously in response to a particular facilitator request.

Lecture or Mini-Lecture: Refers to major content input by facilitator.

Resource Information Activity: Refers to major content input by guest speaker or employer representative.

Materials: Designates distribution points for RPG booklets or other materials used.

Outline of the Workshop in Four Time-Blocks

A design "time-block" consists of 3½ hours of usable time (a morning or an afternoon, for example). The actual program outline sometimes falls short of the allowed 3½ hours, sometimes exceeds it; some slippage is tolerable in either direction during actual delivery. In full-day formats, too, a lunch period may be shortened or lengthened depending upon how far participants must travel to eat. Generally, a morning block is thought of as running from 8:30 or 9:00 to 12:00 noon, an afternoon block from 1:00 to 4:00 or 4:30. The number of topics per block varies.

Various group activities mentioned will have been seen earlier in the discussion of the interaction-group method; as noted there, the conduct of several commonly used activities is elaborated upon later in this chapter.

BLOCK 1

TOPIC: ORIENTATION TO PRE-RETIREMENT PLANNING	Time Item	Time Cum
(cumulative elapsed time shown on right)		0:00
Procedural Activity: Employer introduction of workshop and staff (if applicable). Program leader remarks toward a rationale for pre-retirement education. General introduction of the educational format and method.	10	0:10
Procedural Activity: Get-acquainted warm-up and formation of workshop DISCUSSION GROUPS.	20	0:30
Procedural Activity: Instructions to the groups regarding their conduct of the workshop business.	5	0:35
Linkage Commentary: Planning for what? Beginning by defining the issues and problems present in the general matter of retirement (introductory to the activities to follow).	5	0:40
Materials: Distribute activity form: IDENTIFYING RETIREMENT CONCERNS.		
Individual Activity: Participants complete IDENTIFYING RETIREMENT CONCERNS (ranking) form.	5	0:45
Discussion Groups: Groups complete group-rankings on IDENTIFYING RETIREMENT CONCERNS form.	15	1:00
Reports: Group reporters read group rankings of concerns. Leader records on chalkboard or chart paper. Leader adds data from research and interpretive commentary. Questions and general discussion.	15	1:15
Summary Linkage: Linkage to the importance of planning and to the simple decision-making model presented in BOOKLET 1 (participants have advance possession).	10	1:25
BREAK		

TOPIC: AGING: ATTITUDES, MYTHS, AND FACTS	Item	Cum
Linkage Commentary: Associating aging and retirement issues; acknowledging importance of attitudes toward aging.	5	1:45
Materials: Distribute activity form: FACTS ABOUT AGING QUIZ.		
Individual Activity: Participants privately complete quiz (either on separate form, or in BOOKLET 2, as leader prefers).	8	1:53
Materials: Distribute BOOKLET 2.		
Individual Activity: Participants score own quizzes from answers in booklet.	7	2:00
Read: Participants privately read/browse BOOKLET 2 (complete reading not intended).	8	2:08
Summary Linkage: Facilitator conducts general question-and-answer discussion.	10	2:18
TOPIC: POSITIVE HEALTH MANAGEMENT		
Linkage Commentary: Importance of positive health planning, with linkage to ranking and research data from first activity above and to aging/health concerns in second topic-area above.	7	2:25
Discussion Groups: BRAINSTORM techniques, ideas, suggestions related to positive health planning, using CHART paper in each group with recorder and heavy markers.	5	2:30
Reports: Group reporters read brainstorm lists. Leader adds interpretive commentary.	10	2:40
Resource Information Activity: (option, if applicable) Employer representative discusses kinds of decisions facing pre-retirees with respect to medical insurance coverages that have provisions for continuing into retirement. Linkages emphasize appropriate in-house counseling resources. Interface with MEDICARE insurance is pointed out.	(15)	
(option) Lecture by guest expert on positive health management for older adults (in addition to doctors, several other kinds of health professionals today are involved in the issues of personal health planning and management).	(45)	3:25

	Item	Cum
Materials: (1) Any employer-prepared literature on medical insurance programs. (2) Medicare Handbook (have on hand from Social Security office). (3) RPG BOOKLET 7 (for post-workshop reading).		
Individual Activity: Have participants privately return to BOOKLET 1 and complete HEALTH PLANNING AID on page 8.	4	3:29
Summary Linkage: Re-emphasize brainstorm and lecture themes, linking to the relevance of planning for positive health (rather than only planning for illness), and point out the different kinds of resources that pertain here.	6	3:35

BLOCK 1 RECAP Actual time scheduled: 3:35 hours:minutes

BLOCK 2

TOPIC: FINANCIAL PLANNING

Linkage Commentary: Attitudes, fears, inflation, and usable information. Re-emphasize the importance of planning, linking to information generated in the first activity above and its associated research data.	10	0:10
Individual Activity: Have participants return to BOOKLET 1 and complete FINANCIAL PLANNING AID on page 9.	4	0:14
Materials: Distribute FINANCIAL PLANS & EXPECTATIONS QUESTIONNAIRE.		
Individual Activity: Participants complete the FINANCIAL PLANS & EXPECTATIONS QUESTIONNAIRE privately.	4	0:18
Read/Review: Participants read/review BOOKLET 3 privately (had advance possession).	10	0:28
Discussion Groups: Examine financial issues, with emphasis on what seem to be most critical planning barriers and information needs. (NOTE: Pre-advise groups that reports of their discussions will be solicited later, and that they will need to have reporters designated.)	12	0:40

	Item	Cum
Discussion Groups: Give groups notice to organize surfacing issues and themes for reports (allow the indicated additional time for discussion).	5	0:45
Reports: Group reporters summarize discussion of respective groups (important themes, etc.). Leader adds interpretive commentary and linkage to resource activities which follow.	10	0:55
Resource Information Activity: (option, if applicable) Employee representative presentation concerning retirement benefits options, pensions, etc. A standard presentation that reviews general information and establishes a framework for individual considerations. Linkage is made to in-house counseling resources on benefits issues.	60	1:55
(option) Lecture by guest expert with questions and answers. Income sources, budgeting, taxation, property, estate issues and wills, and so on. It is perhaps most important that such a speaker be appropriately oriented to the character of the audience's information needs (one technique which can help here is to have the groups brainstorm in advance lists of issues they would want addressed).		
Materials: (1) Your Social Security. (2) A Woman's Guide to Social Security. (3) Social Security account information request form (post card). (Have these materials on hand from Social Security office.)		
BREAK	15	2:10

TOPIC: LIVING ARRANGEMENTS AND HOUSING

In this model, the topic-area concerned with living-arrangements issues effectively serves the transition from the broad, foundational considerations to the more personally focused ones which follow. Reflecting that "swing" position in the particular design here, the topic is carried over from activities shown at the conclusion of BLOCK 2 to some further attention in BLOCK 3. A reading assignment links the two sessions.

	Item	Cum
Linkage Commentary: Associating living arrangements and finances, relationships, activities, etc.	5	2:15
Individual Activity: Participants privately make lists of reasons they might have for moving after retiring, and reasons they would have for staying in their present residences.	4	2:19
Reports: Spontaneous reporting of reasons from the full group. Facilitator uses CHART paper to collect a sampling of reasons under each category (moving/staying), one category at a time. A third list asks for reports of all the different kinds of housing imagined in present thoughts on the matter. With linking commentary to other topics. Post lists for later later reference.	15	2:34
Mini-lecture: Progressive living-arrangements needs throughout the life-course (standard framework that emphasizes the normal pattern of periodic change in such needs).	10	2:44
Materials: Distribute BOOKLET 4.		
Reading Assignment: Participants to read BOOKLET 4 prior to next session.		

BLOCK 2 RECAP Actual time scheduled: 2:44 hours:minutes

BLOCK 3

TOPIC: LIVING ARRANGEMENTS (continues)

Discussion Groups: Share views and feelings related to the living-arrangements issues, the reading material (BOOKLET 4), and plans already made. (NOTE: Pre-advise groups that reports will be called for.)	12	0:12
Give groups notice to organize surfacing issues and ideas for reports (allow the indicated additional time for discussion).	5	0:17
Reports: Group reporters summarize discussion of respective groups (level of plans already firm and outstanding themes).	12	0:29

	Item	Cum
Linkage Commentary: Introduce "imagining the future" as a planning behavior, setting stage for next activity.	4	0:34
Individual Activity: Participants respond privately to guided FANTASY DAY exercise.	11	0:45
Materials: Distribute copies of FANTASY DAY questions (only after the guided fantasy narration).		
Discussion Groups: SUBGROUP men/women for discussions of fantasy responses, revelations, insights, reactions.	12	0:57
Give subgroups notice to organize surfacing issues and themes for reports (allow indicated additional time for discussion).	4	1:01
Reports: Subgroup reporters briefly summarize respective discussions.	12	1:13
Summary Linkage: Connecting fantasy discussion themes (use of time, people and family, change and personal development, etc.) to topic-areas remaining in program.	5	1:18
BREAK	15	1:33

TOPIC: TIME, LEISURE, ACTIVITIES

Discussion Groups: BRAINSTORM the "good things about retirement"; use CHART paper in each group with recorder and heavy markers.	5	1:38
Reports: Group reporters read respective brainstorm lists. Post lists for reference.	8	1:46
Linkage Commentary: Pick up themes from brainstorm reports (freedom, time, opportunity), and link to matters of leisure, lifestyle, use of time, etc.	7	1:53
Individual Activity: Have participants return to BOOKLET 1 and complete ACTIVITIES PLANNING AID on page 10.	4	1:57
Materials: Distribute BOOKLET 5.		

	Item	Cum
Read + Individual Activity: Participants read BOOKLET 5, and, at that point where instructed (in the reading) to do so, they complete the ACTIVITIES INVENTORY on pages 8 and 9 of booklet (see note below).	15	2:12
LEADER NOTE: Since people will move along at different rates, and since some spontaneous interaction usually attends the inventory activity, the leader may want to move ahead into the next activity when most have completed the inventory (without returning to the reading).		
Discussion Groups: Use either full-groups or subgroups (men/women) option. Discuss ideas stimulated by inventory and reading material.	12	2:24
Reports: Spontaneous reporting from the full group. Facilitator uses CHART paper to collect a sampling of activities mentioned under each of three categories: (a) things enjoyed alone; (b) things enjoyed with an intimate friend, companion, spouse; (c) things enjoyed with a group. Collect one category at a time, asking participants to call out activities for the category. Add interpretive commentary. Post lists.	13	2:37
Summary Linkage: If available, this is the appropriate place to distribute any useful literature from local activity resources, and to link themes from earlier discussions to potential activities resources in the community. Or, a leader may wish to hold a quick, full-group brainstorm of the kinds of activities resources that have been brought to mind, that are already being used, or that individuals are planning to explore. Re-emphasize that, in the remainder of BOOKLET 5, participants will find interesting discussion about what some research has shown with respect to activities in later life.	10	2:47

BLOCK 3 RECAP Actual time scheduled: 2:47 hours:minutes

BLOCK 4

TOPIC: PERSONAL DEVELOPMENT, CHANGE, PSYCHOLOGICAL HEALTH

Lecture: Toward a perspective on adult development, and on social and psychological changes in the second half of life. AMOEBA concept, with general discussion.	35	0:35

	Item	Cum
Materials: Distribute BOOKLETS 6 and 8 for post-workshop reading, with linking commentary (especially between various themes raised in earlier discussions and the relationship issues examined in BOOKLET 6).	5	0:40
TOPIC: ORGANIZING PERSONAL RESOURCES FOR ACTION		
Linkage Commentary: Exploring and organizing personal resources for decision-making and action.	7	0:47
Materials: Distribute BOOKLET 9.		
Read + Individual Activity: Participants read BOOKLET 9 privately and develop personal inventory by responding to several questions as each one is encountered in the reading. Encourage participants to complete the activity privately, and to try to develop at least one response for each question.	20	1:07
Discussion Groups: SUBGROUP men/women for discussions of inventory responses, insights, reactions. (Do not call for reports of these discussions.)	15	1:22
Individual Activity: PERSONAL COMMITMENT exercise. Participants privately identify one action that will be taken with regard to own retirement preparation as a result of the workshop. Emphasize that one should be as specific as possible in defining an action that bears upon the planning of the future, and ask that each person write down the chosen action on a piece of paper.	5	1:27
Discussion Groups: Full groups reassembled. Individuals announce PERSONAL COMMITMENTS to their discussion-group partners. The commitments are to be shared without qualification or discussion, each in turn around the circle.	7	1:34
Summary Linkage: Briefly review workshop purposes (perspective, information, stimulus to action), and re-emphasize personal planning work yet to be done.	12	1:46
Materials: Distribute final RPG (BOOKLET 10) and series folder.		
Procedural Activity: Participants complete workshop EVALUATION questionnaire.	10	1:56

BLOCK 4 RECAP Actual time scheduled: 1:56 hours:minutes

2. Selected Activities Used in Small-Group and Workshop Methods

Both the interaction and workshop models develop around small-group concepts, and both incorporate a variety of small-group activities that can be adapted effectively to the topical themes in pre-retirement education. This section presents several such activites; they are introduced here following the sequence of their appearances in earlier discussion of the program models. The collection here does not exhaust the list of such activities adapted for small-group models; it does examine some of the more consistently used ones.

The intent is to provide something of a rationale and a procedure for each activity, by (1) establishing its relevance to specific procedural objectives and/or topic areas, and (2) describing how it might typically be introduced and conducted. Required materials will be noted. Examples of all forms are included.

Senior Employees Questionnaire

Rationale. As a research tool, the SEQ derives from Greene (1969) and Manion (1969). Its use as a program tool is rooted in findings reported in those works about attitudes and beliefs among both older workers and retirees. The instrument evolved in the tradition of life-satisfaction and life-adjustment measurement (Havighurst, Kutner, etc.), adapted to specific questions surrounding aging and retirement.

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*The reader may have encountered some of these exercises in contexts other than that of pre-retirement education; origins are often difficult to trace, since exercises have been handed down, as it were, through several years of training in small-group processes. Some of the activities here were originally conceived by Manion (1969, 1975, 1977). The particular versions of some of the forms (physical arrangements and wordings) have been designed by the author. All of the text of this section is borrowed from other work by the author and by Manion, with permission.

Essentially, the brief SEQ yields two scores for a participant, one for a measure of attitudes toward retirement and aging, the other for a measure of beliefs about the same matters. In its use as a program tool (innovated by Manion), participants complete the SEQ after introductory remarks but before warm-up activity. The scores (for the group as a whole, as well as grouped by sex) are later introduced in a session addressing the importance of these matters (present attitudes and beliefs) in the preparation for and transition to retirement life. The scores are interpreted in reference to the very sound norms for the general population reported in the indicated studies.

The reference value for the participant is two-fold: (1) at a general level, the participants learn that, as a group, they are really not markedly unlike most people in the distribution of their attitudes and beliefs from negative ones to positive ones; (2) as a specific group, however, they are confronted with the fact that many of them do hold negative (or at least less than positive) views and feelings in this area. While the general identification tends to balance the more specifically confronting information, the message is nonetheless effectively carried. In groups of 30 or more, the scores will almost always distribute themselves in a pattern that can be compared usefully to the provided norms; the pattern tends to be steady even within seemingly insular groups, such as those from a single employer, occupational category, or small community. The smaller the group, of course, the greater the likelihood of skewed distributions.

In discussing the scores, Manion (1969, 1975) distinguishes between attitudes and beliefs, in general, along the following lines: (1) attitudes are seen as the more abstruse, more deeply held but less clearly conceptualized, and more difficult to change; (2) beliefs are regarded as more cognitively arranged, more concrete, and more accessible to change via the introduction of new information. An attitude is manifest in a tendency to respond to a given set of stimuli with a certain pattern of affect and behavior; a belief is manifest in an intellectual conclusion, a judgment that something is so. When joined in perspective with the other data he reports about the influence of attitudes upon measured life-satisfaction and adjustment among retirees (see RPG booklet 1), the point of the SEQ procedure for the pre-retiree is clear: some self-assessment now in these areas is integral to constructive planning. And the reporting back of the scores comes precisely at that point in the method--when the focus swings from the broad foundational topics to the more specifically individual, developmental issues.

Procedure. The SEQ form included omits the demographic portion of the original; only a participant's sex is asked for. A participant completes the form anonymously. A space for a personal identification code is provided, where a participant may create a code should he or she feel a desire to see personal scores later. (The facilitator should not stress this matter, but, responsibly, one must allow for the participant who will really want to know where he or she stands after hearing about the distribution.)

Introduce the questionnaire in general terms, by suggesting that the first thing you want to do is obtain some information from the group, and that later you are going to talk about how people in general respond to these issues, and so on. Be brief; but be relaxed about the matter, not unduly investigatory. Use the exercise as an opportunity to engage the participants in the give-and-take, participatory character of the program.

Before distributing the form, explain the identification code (a common technique uses the initials of one's mother's maiden name, followed by the month of her birth, the intent being to avoid duplication within the group). Thus: RAL-January, or RAL-1. Distribute the forms, and stress that all items should be marked. Collect the completed forms. You will need to score the questionnaires prior to the session in which you plan to report back to the group; if that be later in the same day, you will probably have to attend to the scoring during the lunch break.

Scoring. Once you become accustomed to the scoring key, you will need less than a minute to tally each questionnaire. The scoring is shown below by item; the first 11 of these constitute the attitude scale, the last three the belief scale. The 11 attitude items for each questionnaire are summed, and the total score is converted to a low (negative), medium (average), or high (positive) category in the same manner as was done in the national study. The same procedure is observed for the three-item belief score. The conversion categories are shown following the item scoring key below. Using the conversion guide, you must tally the number of scores in each category, and convert the total in each category to its respective percent of the total participant group. Your final set of figures should look (in form) like the national sample distribution of percents shown below on the feedback form (page following conversion guide). The additional two questions on the SEQ (shown only on version of form included in Appendix D) are not utilized in this part of the scoring; they can simply be tallied by response, converted to percents, and reported out as additional feedback to the group. You should observe any degree of inconsistency between the profile of responses to these two questions and the profile of attitudes and beliefs in the group.

SENIOR EMPLOYEES QUESTIONNAIRE
(Scoring Key)

	Strongly Agree	Agree	Disagree	Strongly Disagree
I have made many plans for things I'll be doing in retirement.	4	3	2	1
The things I do are as interesting to me as they ever were.	4	3	2	1
Retirement will probably be the dreariest time of my life.	1	2	3	4
I expect some interesting and pleasant things to happen to me in retirement.	4	3	2	1
I expect retirement to be the best years of my life.	4	3	2	1
I'll probably find a hard time keeping busy in retirement.	1	2	3	4
As I grow older, things really seem better than I thought they would be.	4	3	2	1
I feel old and somewhat tired.	1	2	3	4
My life is full of worry.	1	2	3	4
Things seem to be getting worse for me as I get older.	1	2	3	4
My life could be happier than it is now.	1	2	3	4

	Strongly Agree	Agree	Disagree	Strongly Disagree
Retirement is generally bad for a person.	1	2	3	4
People should retire only when they are no longer able to work.	1	2	3	4
Retired people do not generally receive the respect they deserve from younger people.	1	2	3	4

SENIOR EMPLOYEES QUESTIONNAIRE
(Total Score Conversion Guide)

	Total Score	Conversion Key	Category
Attitudes	0-31	1 (low)	Negative
	32-36	2 (medium)	Average
	37-48	3 (high)	Positive
Beliefs	0-08	1 (low)	Negative
	09-10	2 (medium)	Average
	11-12	3 (high)	Positive

Reporting. As a kind of "swing" input taking the planning focus back to the individual, the report and discussion of the SEQ scores typically has been located, as in the earlier outline for the interaction model, just prior to considerations of life-style issues related to time, leisure, and activities. Too, because attitudes are deeply involved in the transitional issues of work, leisure, and identity surfaced by the subject of retirement, it is highly appropriate to discuss them at that point. In the kinds of program being advanced herein, the second half (beginning with the topic of life-style change and leisure) is always designed to move toward personal planning issues, and to emphasize the positive, developmental qualities of the retirement life-stage. Thus the confrontation about negative attitudes should come prior to that shift, as if to acknowledge: "Yes, we do indeed hold some negative and counterproductive views and feelings about this business of retirement; but, now, perhaps we can change that perspective with some examination, and can find a much better feeling about taking charge of how this new life opportunity is going to evolve for me."

RETIREMENT-RELATED ATTITUDES AND BELIEFS, AS MEASURED BY THE SENIOR EMPLOYEES QUESTIONNAIRE

Attitudes Toward Retirement

	National Research Sample*	Pre-Retirement Workshop Group
Negative	37%	
Average	29%	
Positive	31%	
No Response	3%	
Total	100%	100%

Beliefs About Retirement

	National Research Sample*	Pre-Retirement Workshop Group
Negative	26%	
Average	46%	
Positive	24%	
No Response	4%	
Total	100%	100%

From U. V. Manion, Company Policies and Early Retirees Experiences, Doctoral Dissertation, University of Oregon, 1969.

The presentation need not be drawn out. To catch the spirit in which the information is presented, read through the following brief lecture, adapted from Manion (1975). If you should use this approach, you will need copies of the feedback form for all participants, and you should decide in advance your procedure for distributing them (either before you begin, or at that point in the lecture when they are used).

> At the beginning of this seminar, before we had provided any information about retirement, you were requested to respond to some statements about retirement and aging. The statements we asked you to state your degree of agreement or disagreement with are designed to measure attitudes and beliefs people hold about retirement and aging.
>
> We have since scored your individual responses to those statements, and at this time I would like to report your combined scores to you. That is, I want to tell you how this group, as a group, scored in comparison with a national sample of 855 early retirees who responded to the same questions.
>
> The statements represent items taken from three research scales. One of the scales is used to examine resistance to retirement. Another has been used to measure negative "stereotypes" (define) about retirement. The third scale, developed by Havighurst and Neugarten at the University of Chicago, measures life satisfaction among older people. Together, the statements are supposed to measure attitudes and beliefs about retirement.
>
> Please recall that we previously defined an attitude as a sort of mental set which causes one to respond in a certain way to particular stimuli. A belief, on the other hand, represents something one has thought about and reached an opinion or conclusion about. An example of one of the belief statements was: "Retirement is bad for a person." If you strongly

agreed with that statement, you probably believe that retirement is indeed bad for a person, and you could probably state your reasons for agreeing with that statement.

Sometimes the attitudes and beliefs we hold are inaccurate. That is, they may be based upon misinformation and misconceptions. Therefore, one of the purposes of this seminar is to present current, factual information, from sound research, in order that you might have the opportunity to re-evaluate your attitudes and beliefs.

Now, how does this group compare with the national sample of early retirees? The form I am giving you shows how the national group's responses were distributed from negative to positive on both scales. There is also a place on the form for you to enter the percents for our group here. Note that a good many people in the national group, 37%, held negative attitudes toward retirement and aging; 29% had average scores; and about one-third held positive attitudes. Notice that 3% didn't, or wouldn't, respond.

To the right of the national scores, you may want to write in the figures for our group now. __% scored low, or in the negative range; __% had average scores; and __% scored high, in the positive category. (Observe any percent in the no-response category.)

With respect to beliefs about retirement, 26% of the national sample had negative beliefs, as shown on the bottom half of your form there. 46% were so-so, and 24% held positive beliefs. 4% did not respond. In our group here, __% scored low, __% average, and __% high, or positive.

(Insert here observations about the similarity or dissimilarity between the national and program groups. Perhpas the program group shows a somewhat more negative profile, or more positive profile. The leader should point out the general comparisons, without getting into any protracted discussion on the matter at this point. Lecture continues following.)

Now you might be wondering about the significance of this data. It is significant in several ways. First, it might surprise you to find, if you have some deep reservations about retirement, that you are not the only person in this room, or in the nation, who feels that way. As a matter of fact, you have plenty of company. It would seem, therefore, that it might be important for you to recognize and own up to your true feelings, and try to figure out just what it is that causes you to feel that way. That first step in problem identification is also the first step toward problem solution.

A second meaning in the data comes from research. In the original study of the national sample, the researchers found a strong, positive correlation (define) between having positive attitudes and beliefs about retirement and aging, on the one hand, and adjustment and satisfaction in retirement, on the other.

A third finding of the research is also of interest. The research found that early retirees who voluntarily retired, that is, who <u>set a date</u> for retirement, and who <u>planned</u> toward that date, made a better adjustment to retirement than did those whose retirement was due to circumstances beyond their control and choosing. This finding may be significant, as well, to those who retire even at a mandatory retirement age. The important message here could be that one should set the date (even if it be the last allowable day), and plan toward that date. If you set the

date as your decision (rather than seeing it only as the employer's decision), the chances are you will make a better adjustment and find more satisfaction in your later life.

Now, if any of you wish to question me about your individual scores, catch me during our coffee break. (Feedback on individual scores should be honest; for those with negative profiles, be supportive, stressing that such views and feelings are learned, and suggesting that this is an opportunity to examine what influences might have shaped these scores and to begin some re-evaluation based on new information.)

This lecture provides a brief but thoughtful statement about this highly individual matter of personal feelings, choice, and control, and of taking psychological ownership of the retirement event and transition. The idea here sets a very appropriate tone for the considerations which follow in the program.

Warm-Up Activities

Warm-up activities have been amply demonstrated and discussed within the ERY training, and a variety of references on the subject are available (Knowles, 1973; Ingalls, 1973; Pfeiffer and Jones, 1970). It will suffice here to review the intent and general structure of these activities, and to relate them philosophically and procedurally to the educational methods being considered.

The models outlined above, as discussed in Chapter 2, are seen as examples of participatory educational processes--as experiences in which the participants are active, interactive, contributory, collaborative. The theoretical underpinnings of such education are concisely reviewed by Knowles (1973). The application of such principles in pre-retirement education has been most visibly advanced by Manion (see Chapter 2).

With respect to effective andragogy, both Ingalls (1973) and Knowles argue the importance of the teaching/learning environment, and, within that construct, of the climate for learning. Warm-up activities are integral to what these authors specify as the "human and interpersonal" aspect of the learning climate; such activities serve objectives for setting a climate characterized by mutuality, respect, collaboration, and informality (these qualities listed by

Knowles, 1973, Table 5-3, p. 104). Relaxed get-acquainted exercises are intended to reduce anxiety (new situation), set an informal tone, model interaction and communication skills, and reveal a mutuality of interest among participants.

Warm-ups are always included in designs for interaction groups and multi-group workshops. About 20-25 minutes is usually devoted to a warm-up; broadly, people spend this time meeting several of the others in attendance. Instructions throughout lead participants into diads, trios, and/or foursomes to meet each other, discuss expectations, talk, listen, report what they think they hear others saying about the issue (retirement). If with a large group, the latter part of the warm-up will evolve into the formation of the smaller discussion groups.

As a basic climate-setting activity, a warm-up normally comes early, probably following any official introductory remarks or ceremonies that might be involved. The author typically moves into the warm-up from a broader comment on the teaching/learning method to be used. It is acknowledged that the method: (1) might look different from what we have come to expect "education" to look like; (2) intends purposely to be enjoyable as well as beneficial; and (3) assumes that much of the experience and wisdom relevant to our consideration of retirement resides in the pre-retirees themselves. Without laboring the matter, and in a spirit of mutuality, participants are asked to give the method a chance (and, in effect, to take some responsibility for its conduct). The warm-up immediately makes visible that "different look." It can be introduced simply with the idea that we are going to spend some time getting acquainted with others. In large groups, the author begins with a simple pairing: "First, find someone with whom you are not acquainted (or at least not well acquainted), and spend a couple of minutes visiting."

Beyond this point, leaders use a variety of exercises. Certainly, the size of the group affects the shape of the activity. The reader is referred to the mentioned works for detailed examples. A leader should possess a clear rationale for the chosen exercises and should operate only from a thoroughly planned sequence of events. A sound rationale and plan afford the flexibility needed for changing specific exercises along the way, if desired.

The warm-up is intended to engage participants immediately in their learning experience; a leader models involvement by his or her own behavior during the activity. The author always establishes himself obviously as an observer of participant conversations, occasionally commenting on something said--modeling feedback, paraphrase, or other communication

behaviors (always moving on without becoming drawn into extended conversation). The point is made that what is going on is important to him, and thus to the business of the workshop. If an uneven number is present, a leader may have to fill out a pairing. One must sometimes give special attention to a slow-starting member, gently guiding him or her into interaction with others. During this activity, too, if involved, the leader discovers important special circumstances such as hearing problems. Surely, the leader's behavior influences whether the activity achieves the natural, interpersonal, informal quality that is being sought for the learning climate.

Identifying Retirement Concerns (Problem Ranking Exercise)

Rationale. A first principle of task-oriented group processes involves mutual recognition of the concerns addressed by the task. The task is planning. What, then, needs to be planned for? The "problem ranking" activity, as it is commonly called, vibrates to that question. Individuals and groups have opportunities to consider ten generally stated retirement concerns, and to rank them as potential problem areas in retirement life. The activity serves to identify a number of topics relevant to retirement planning, and it never ceases to reveal certain consistent patterns among the concerns of pre-retirees (supporting group development and interaction). At the same time, it establishes the issue of individual differences with respect to such concerns (recognizing and supporting the uniquely individual aspects of retirement preparation). In other words, the activity taps both shared concerns and individual projections. Helpful to the impact of the exercise are some research data showing how retired people themselves rank these ten concerns; use of this information is detailed below.

Procedure. Use the activity with one small group, or with several groups simultaneously. With more than one group, facilitators generally employ a report-out feature, to promulgate all of the information being developed. Introduce the activity with comments on the importance of identifying the issues underlying the argument for planning. Distribute the standard form (following), which lists ten concerns associated with aging and retirement, and which carries blank columns for both individual and group rankings. Ask participants, first, to rank these items individually and privately; re-emphasize the importance of privacy if people begin to interact during the ranking (married couples present often compare notes, for example.) Five minutes is usually more than enough time for this phase; gauge completion by monitoring, and, when most have finished, give a one-minute deadline for finishing-up.

RETIREMENT CONCERNS

The factors listed below are related to retirement adjustment. Please rank the items according to how you foresee them as problems in retirement. For example, if you consider boredom the most worrisome of the list, give it the rank of 1 by placing a 1 in the MY RANKING column; if you think marital relationship the next greatest concern, give it the rank of 2. Use all of the numbers 1 through 10, and use each number only once.

Your discussion leader will explain the use of the GROUP RANKING column.

	MY RANKING	GROUP RANKING
Boredom	_____	(7)* _____
Living Arrangements	_____	(6) _____
Feelings of Worthlessness	_____	(8) _____
Health	_____	(1) _____
Finances and Standard of Living	_____	(2) _____
Marital Relationship	_____	(4) _____
Loneliness	_____	(5) _____
Loss of Work Relationships	_____	(9) _____
Death and Bereavement	_____	(3) _____
Legal Affairs in Poor Shape	_____	(10) _____

*For the facilitator's use, this column shows the ranking of these items by a sample of persons already retired. THESE FIGURES DO NOT APPEAR ON THE FORM AS IT IS PREPARED FOR PROGRAM PARTICIPANTS. This information has long been used in conjunction with the exercise (as described below in the text); however, the author has been unable to locate a published source or specific reference for the study. The information is customarily reported as the findings of a survey responded to by several hundred members of the American Association of Retired Persons, apparently in 1970. The author is presently engaged in research among pre-retirees in an attempt to develop current comparative information about these items.

Alternative techniques appear in the second phase. A small group may be left intact to hammer out a group ranking (concensus). Or existing groups may be further sub-grouped--by sex, for example--to produce added information. A facilitator may wish to sub-group to stimulate more discussion and participation. A program involving only one group probably will benefit from sub-grouping to compare men's and women's perceptions of these concerns. There is usually some expressed confusion about how to agree on what seems such an individual matter. Keep the pressure on for concensus, in spite of the fact that it is an unreasonable demand. Outlaw averaging and similar schemes. Acknowledge that the perspective here must be a more general one, having to do with how the group perceives these concerns as problems for retired people in general. Point out that one does not give up his or her individual ranking by agreeing to a different view of retirement in general. A small group can spend at least 20 to 30 minutes on this phase productively. Beyond that, continuation becomes a matter of facilitator judgment and program constraints.

The final phase employs the report-out feature, if more than one group is present working on the activity; the separate group rankings should be shown on a largely visible chalkboard or chart. Acknowledge the possible presence of minority reports, and hear them out. For discussion, offer the research data on how these concerns have been ranked by a large sample of people already retired, pointing up the interesting differences and similarities.

This exercise generally stimulates a good deal of positive interaction and participation; thus it makes a good activity to use early for group development. It has been a standard inclusion in small-group interaction models, and it is equally as appropriate for use early in other discussion modes.

Barriers to Planning (Brainstorm Activity)

This also is an early activity in most programs using it, often associated with an opening input on the importance of planning. A brainstorming activity, of course, is a good way to begin establishing a group identification among the participants. This exercise also reveals shared impediments to planning. What can be expected as barriers are concerns and issues that can be categorized as having to do with time, money, change, attitudes, information, motivation, and/or fear--just to mention some of the more consistent themes.

Procedure. Usual brainstorming instructions. Use large chart paper and heavy markers. If only one group, you may use chalkboard. Inform that the intent is to get out as many ideas as possible--not to discuss them, qualify them, debate them--but just to get down each idea that comes to mind as inhibiting planning for the future. The facilitator should project an urgency about the pace and should intervene whenever necessary to make sure the process moves right along from one input to the next. The completed list should be shared (reported-out if more than one group) and re-read for closure. Some general discussion may proceed. Essentially, the list makes an exhibit for reference during the workshop, since many of the ideas raised will be approached by one topic or another.

The "Facts About Aging" Quiz

Rationale. Serving the topic concerned with aging, with attitudes toward aging, myths and misconceptions about aging, and the need for clear and accurate information, the "facts about aging" quiz (with answer sheet following) has become a standard activity. Included here is a sample booklet from the RPG series, in which the quiz, answer sheet, and resource information are effectively combined; the entire booklet is included to elaborate the relationship between the quiz activity and factual information about aging. This version of the quiz was first prepared by Frances I. Page (at UOCG) and was later adapted for the booklet by her and Manion. Other versions are extant. Facilitators occasionally develop their own versions or add desired items to existing ones.

The purpose of the activity is to open up consideration of one's aging, since, certainly, attitudes and beliefs about aging are surfaced by the idea of retirement. Generally, participants are seen to become readily involved in discussion of this subject; even the seemingly brief quiz version included here will provoke considerable discussion.

Like the initial planning topic, aging is one of the more global considerations. One will see that small-group methods tend to locate the foundational, more global topics near the beginning, where the need is to set out broad informational perimeters. As a program progresses, the topics, activities, and content all move toward a more specifically individual focus. The early topics, then, serve the model's process by virtue of their conceptual breadth and generality. Thus, here, in the aging topic area, many issues may be acknowledged without being dwelled upon; it is sufficient at this point to establish bearings with the argument for accurate and positive information, since many of the particulars surfaced here are drawn out within other topic areas. Generally, then, this early purpose is sufficiently served by appropriate introduction, the quiz and answers, the group discussion, and the facilitator's handling of factual resource information.

Procedure. A facilitator needs to be familiar with this subject matter in order to manage the activity well. Usually, after linkage remarks that establish aging as an integral issue in the idea of retirement, and which allude to inaccurate information about aging held by so many people, participants are given the quiz. Just a few minutes are needed for completion. The answer sheet is distributed when most or all have finished the quiz. Tell participants to correct their own quizzes. There are always surprised participants, and there may even be one or two who will want to argue one point or another. Discussion keys include the areas of widest disagreement, individual reports of particularly surprising answers, sensitive areas (the facilitator has an opportunity here to model an open and relaxed approach to sexuality issues, for example). Health issues are almost always surfaced by the two items questioning the institutionalized proportion of older people and the progress of health following retirement. You may initiate discussion simply by asking the group what surprises they found among the answers. Manion has traditionally followed this discussion with a mini-lecture (essentially the research data present in the RPG booklet), its intent being to move the participants toward an awareness of the importance of accurate information about aging and being "older."

Financial Plans & Expectations Questionnaire

Rationale. This very brief questionnaire has been designed to tap certain themes that research has shown highly relevant to financial preparedness for retirement. Present are perceptual and attitudinal considerations (anticipated adequacy of income and standard of living, attitudes about the future), informational issues (determination of retirement income amounts, sources, etc.), and behavioral imperatives (how much planning done, what needing to do now). The questions are arranged to conclude with an emphasis on the planning/action issue.

The FP&E questionnaire is intended for private use at the beginning of a session or unit on financial preparation. It is used simply to raise the mentioned themes in the minds of all participants, providing a common background for the assorted input to follow (leader commentary, reading material, film, expert resource person, etc.). Because the questions do inquire into some customarily private matters, responses are not directly called into the discussion; it is assumed, however, that the questionnaire does set out important directions that will be reflected in later discussion among the participants. The themes tapped by the questionnaire are struck in many different ways by the commonly used reading materials, films, and other information sources regarding financial planning.

FINANCIAL EXPECTATIONS & PLANS: Please answer these questions for your own personal reflection. This questionnaire is for your own private use, and you are not expected to share this information.

1. What do you anticipate your standard of living will be in retirement? Do you expect it to be higher, lower, or about the same?

   Higher_____ Lower_____ About the same_____

2. Will you have income sources or reserves in addition to your pension and Social Security?

   Yes_____ No_____

3. Have you determined, or estimated closely, what your retirement income will be?

   Yes_____ No_____

4. How do you feel about the adequacy of that income? Will it be:

   More than enough_____
   Less than enough_____
   Just enough _____

5. Are you concerned about being able to meet future changes in living expenses, or emergencies?

   Yes_____ No_____

6. How much planning would you say you have done with respect to retirement income and finances?

   Made many plans _____
   Made a few plans_____
   Made no plans _____

7. What matters do you need to investigate to shed some light on your retirement financial picture?

_____

_____

_____

_____

_____

Procedure. Following the general introduction to the financial planning topic area, but before proceeding with any principal informational or discussion activities, the leader asks participants to take just a few minutes to complete the brief questionnaire. Before distributing the form, explain that you believe it will be helpful if each one answers these few questions now for his or her own information. Indicate to participants that this information will not be collected or used in the discussion, that is for their private consideration--but that you do want them to answer the questions now. Only when you can see that they are finishing answering the questions, tell them simply to put the questionnaires away in a pocket or purse. The whole procedure requires only four or five minutes. You will want to acknowledge in your closing commentary that the issues raised by the questionnaire will be seen in much of the input and discussion to follow. Then, continue immediately with the next major activity.

A Day in Retirement (Guided Fantasy Activity)

Rationale. To plan for retirement is to prepare for the future, and the future, one might say, always changes the present. Personal-involvement models of pre-retirement education encourage the pre-retiree's openness to certain predictable life-course changes. It is argued that a perspective integrating retirement and other life-course events is salutary to present planning considerations. The second half of a typical interaction-group or workshop process moves these considerations always closer to the individual assessments which each participant must confront. As program focus narrows from the broad, question-centered topics to personal planning issues, the "fantasy day" can become a potent "swing" exercise. The participant is asked to take a guided look into the future being considered. The activity personalizes the question; it advances the interests of individual perspective--a major intent of the methods being espoused here.

Imagination is encouraged. The participant is asked to look ahead, and to think realistically about the future. The facilitator structures and guides the process with a series of questions about relevant concerns--other people, use of time, life-style, personal development, and so on. The activity calls for a seriousness of purpose at a time when the group(s) should be ready to respond to that call. This seriousness, however, should not be confused with somberness or ominousness; the effective leader will avoid slipping into the tones of ghostly exhortation.

In the workshop outline above, the topic devoted to living arrangements carries the program transition from the foundational issues to the personal-planning considerations. Perhaps more than with any other single topic, thought and imagery about personal habitat touch down in all of the other topic-areas. As placed within this topic, the fantasy activity collects the broader themes evoked thus far (finances, health, aging), and points to the more specific, personal themes ahead (people, use of time, personal development).

Procedure. The following remarks outline the important points to be made in the introduction:

> We have been talking about the future, about planning for the future. This next activity is designed to help us project into that future, and thereby take a realistic look at some things about it. I am going to ask you to imagine a day in retirement--say, two years after retiring, and I am going to ask you a series of questions about that day, and about your life at that time.
>
> It is best to complete the exercise quietly and privately, so find a place in the room where you can be with your own thoughts. Though it isn't necessary, I suggest that you make some notes of your responses to these questions, in order that you may reflect on them further, and to enable you to share some of them with each other (though, of course, you are not expected to share anything which you do not wish to). Don't try to write down the questions; I'll give you each a copy of them after finishing the fantasy.
>
> Let your imaginations go. This is an opportunity to fantasize about what a day in retirement might look like, and to put into perspective various real factors which will influence the future.

These instructions are quite sufficient; the introduction should not become labored. In spite of the suggestion of needed privacy, some laughter and spontaneous talking out can be expected during the early questions (presumably as a result of a low-level anxiety which such an exercise might evoke). If this tendency continues, the author gently reminds participants that "I really want you to work quietly on this, now."

GUIDED FANTASY DAY

(questions to be narrated)

A day, for example, two years after retirement (or spouse's retirement)...and we will say it is a Tuesday...

1. What year is it?
2. When did you get up today?
3. How's the weather?
4. Where are you living?

   ...in what geographic area?
   ...is it in the country, a town, or a city?
5. What kind of a residence are you living in?

   ...is it the house you were in when you retired?
   ...or is it an apartment, ...a condominium, ...a mobile home?
6. If you have children, how old are they now?

   ...are they all married?
   ...what are they doing?
   ...where are they living?
7. Are your parents still living?
8. With whom are you living?
9. How have you spent your morning?
10. What will you have for lunch?

    ...who will prepare your lunch?
11. Today, what things will you do for yourself--just for your own enjoyment, or satisfaction, or well-being?
12. What will you do this afternoon?
13. How will you spend this evening?
14. What do you do for others?
15. Besides your spouse, with whom do you spend time?
16. How is your health?
17. How is your spouse's health?
18. In your reflections today, what things in your life did you think about that were of special importance to you?
19. What are you looking forward to? What goals or plans do you have for the future?

A leader must observe participants demeanor and writing in order to set a pace. The exercise should not drag, though some questions should be allowed more time than others. Do not deliver the questions in an over-serious tone.

This activity is always followed by a discussion period in which individuals have an opportunity to debrief the wide variety of feelings and images and considerations evoked by the fantasy. To maximize each participant's opportunity to achieve the needed debriefing, the author prefers this discussion to go forth in small units of three groups by sex, since many of the issues raised by the fantasy exercise reflect important sex-role questions related to retirement life. The author has noted that women, especially those attending as spouses of employees, find this opportunity to consider the future in conversation with other women a welcome one.

The debriefing groups are told to spend some time sharing some of their reactions to the activity, as well as important insights or feelings evoked in response to particular questions. The leader should caution participants not to try to go systematically through each individual's fantasy, because that would probably prove less productive than discussing selected questions.

Distribute copies of the fantasy day questions before groups begin their discussions.

The reader will note, in the workshop outline above, that the debriefing groups conclude this exercise with a series of reports (the workshop's usual pattern) to the full audience. If sex-role subgroups have been used, reports should be collected from all groups of one sex first, then from all of the other; this procedure emphasizes the important sex-role distinctions which surface in this activity--information of benefit to both men and women, and especially to married couples present. The thrusts of these reports consistently provide the leader with conceptual linkage to the topics following in the program.

The selection of questions on the Guided Fantasy Day form on the previous page was adapted from one originally prepared by Frances I. Page for Manion (1975).

Activities Inventory

Rationale. The activities inventory is a well known device for stimulating thought and discussion about the use of leisure time. Various forms exist. The one included here develops around two considerations: (1) what (and how many) kinds of activities one spends time upon; and (2) the agreement or disagreement between what one does and what one likes (would like) to do. The reader is referred to Greene (1969) and Manion (1969) for discussion of research findings on the relevance of both number of activities and enjoyment of activities as variables impinging upon retirement adjustment.

In discussion formats, the device is typically used to generate information and feelings that can be readily channeled into the small group's interaction. Apart from the small group as a whole, discussion of respective inventory profiles by husband and wife (where attending together) usually proves a high-interest activity. Discussions sub-grouped by sex may support or enlarge leisure sex-role perceptions. Leaders will tap these several discussion potentials to advantage.

Procedure. Manion (1975) uses the inventory as a "starter" for the topic area involving leisure concepts and activities. So used, its general purpose is to stimulate recognition of a personal frame of reference for the input to follow (such as the fantasy exercise, when used here). In the earlier outline for the interaction method, the inventory was positioned in that way, as a starter preceding the more complicated guided fantasy activity. In this arrangement, the author prefers sex-role sub-groups for discussion following the fantasy day. In the interaction method, the men and women may then return to the full group to report on the general directions of their respective discussions; important differences may be expected here as a function of sex, marital status, and the married woman's occupational participation (homemaker/work career). In the workshop method, the several sub-groups of a particular sex should be called upon first for their reports, then those of the other sex; alternating reports between the male and female sub-groups tends to dilute the distinguishing themes present in the men's and women's respective deliverations.

Simply distribute the questionnaire form and ask participants to complete it. Call attention to the fact that two judgments are called for on each activity--one on how often a thing is done, the other on how one seems to feel about an activity; with that matter clarified; the form is quite self-explanatory. The tally is not used in any particular way as a score, but the two summary profiles do add a sharpened quality to the individual's personal activity frame of reference. Participants will begin spontaneously to discuss and share tallies as they complete the form. A leader may wish to use the inventory as a stimulus for immediate discussion.

ACTIVITIES INVENTORY

Instructions: Please read each item and check for both frequency and enjoyment.

	Frequency of Activity			Enjoyment of Activity		
	Often	Some-times	Never	Very Much	So-So	Dislike
1. Playing cards						
2. Shopping						
3. Attending movies or theaters						
4. Visiting amusement parks						
5. Doing art or craft work						
6. Attending large social functions (church dinners, lodge dinners, etc.)						
7. Attending small social entertainments (dinner parties, etc.)						
8. Newspaper reading for pleasure						
9. Magazine reading for pleasure						
10. Book reading for pleasure						
11. Getting together or talking with family or relatives						
12. Attending church and other religious organizations						
13. Reading of Bible or other religious instruction						

	Frequency of Activity			Enjoyment of Activity		
	Often	Some-times	Never	Very Much	So-So	Dislike
14. Fairs, exhibits, etc.						
15. Going out with spouse or partner						
16. Entertaining at home						
17. Dancing						
18. Informal contacts with friends or neighbors						
19. Attending lectures (political, adult education, etc.)						
20. Listening to radio or TV						
21. Odd jobs at home						
22. Attending club meeting						
23. Working on club projects						
24. Golfing						
25. Bowling						
26. Hiking						
27. Planned walking						
28. Picnics						
29. Playing musical instrument or singing						
30. Purposely sitting down to think						
31. Attending sporting events						
32. Attending symphony or concerts						
33. Telephone visiting						

	Frequency of Activity			Enjoyment of Activity		
	Often	Some-times	Never	Very Much	So-So	Dislike
34. Traveling or touring						
35. Using public library						
36. Visiting museums, art galleries, etc.						
37. Performing volunteer work--social service, etc.						
38. Writing personal letters						
39. Special hobbies: coin collecting, stamp collecting, etc.						
40. Photography						
41. Shop work						
42. Gardening						
43. Camping						
44. Fishing & hunting						
45. Boating						
46. Sewing						
47. Needlework, crochet, knitting, etc.						
48. Regular jogging						
49. Active sports (skiing, tennis, etc.)						
ANY OTHER MAJOR ACTIVITY NOT LISTED? 50. _____						
Number checked (total each column)						

Positive Health Management (Brainstorm Activity)

This brainstorm is a short, upbeat activity designed to express what individuals are already doing, should be doing, and are planning to do with respect to their physical and mental well-being. The activity is tied directly to the earlier-noted research on the importance of attitudes toward health and physical aging, and its thrust further emphasizes "planning for health" as something distinct from "planning for sickness." Its use should be considered in relation to other activities typically applied within the health topic-area, such as films (see interaction model above), goal-setting exercises (see health planning aid in RPG Booklet 1, for example), reading materials (insurance, nutrition, exercise, etc.), and so on.

Follow the usual brainstorming procedure. Participants may be told to express the techniques, ideas, and suggestions related to positive health management. Lists from groups almost always express numerous behaviors related to nutrition and diet, fitness and exercise, and medical care; mental health themes are suggested in expressions about attitudes, relationships, variety of activities, and personal new frontiers.

The Good Things About Retirement (Brainstorm Activity)

This short, upbeat exercise can be positioned in one of several places in a typical program outline; some facilitators simply keep it as a leader's option for a time when it might "pick things up." It is a good after-lunch activity, for example.

As noted above, interaction and workshop programs are designed to move from the broad, problem-centered issues to normal developmental perspectives and personal planning considerations. The process reflects this movement, and the "good things" brainstorm is commonly used in the spirit of punctuating the transition to positive consideration of the future; thus, the author would be more likely to use it at some point in the second half of a program.

Procedure. Usual brainstorming instructions. Chart paper for small group(s). Recorder in each group is to write down participants' responses. No discussion or qualifications.

> We have looked at some important research about retirement concerns, and at some of our own views and feelings about retirement and aging issues. Now, let's spend some time on the good things about retirement. Take just a few minutes to make a record of all of the good things about retirement. . . what are the things you look forward to?

The material is handled as noted for brainstorms above. Lists can be posted. Where more than one small group, reporters should read lists to full workshop.

The two broad themes that are evoked in the lists are those of time and freedom: time to do the things one wants to do, and freedom from such constraints as schedules and responsibilities. Often, lists are quite detailed, revealing a rich range of personal expression foreseen in retirement. A salutary amount of humor can also surface in this activity. The two themes noted, of course, key directly to all of the topics normally addressed in the second half of a program (use of time, leisure, relationships, personal resources and values, etc.); a facilitator's commentary can build upon these linkages.

Personal Resource Inventory

Rationale. This activity has been a traditional one for many years in a variety of group processes involved in life-planning and personal goal-setting considerations, and its general rationale is well known.* In pre-retirement education, the activity is used late in interaction-group and workshop methods, as the focus moves to the final question of individual values and goals, and of related targets for behavior (action). The character of the inventory exercise is such that its experience is both practical and strongly symbolic. It takes the immediate process to the question of individual action, where the planning experience must ultimately be realized, and, at the same time, it raises that question of individual action in a broader sense--of all life itself. In this sense, in methods such as those outlined above, the inventory activity serves to integrate process and content as the educational experience concludes. Coupled with the Commitment to Action activity, which the author always uses immediately following, the inventory completes the

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*The exercise develops around the well-known life inventory, which the author believes originally appeared as a part of Herbert A. Shepard's "Planning for Living" materials (along with the much used life line, etc.).

movement from the initially broad, perspective-building considerations to the finally personal, action-organizing ones. The method's final thrust here intends to leave the participant with two general effects: (1) an enhanced sense of personal authority with respect to his or her retirement event, transition, and life-stage; and (2) a slate of specific actions to take in the interests of effective retirement planning (as well as a stated commitment to one of these actions as a "first step").

Procedure. The activity proceeds first as an introspective one, then as an interactive one. On a prepared form, the individual develops information about his or her values, goals, hopes, and behaviors; then, in small discussion units, participants share the personally important reactions to the inventory, note difficult questions, reveal insights, and generally help each other clarify and supplement the developed information. The general method's two-pointed process message reaches its fulfillment in this activity--where both the uniqueness of the individual (and his or her retirement) and the relevance of mutuality are set down in both philosophical and practical terms. The activity returns the planning process to an individual context; at the same time, it makes a final symbolic statement about the facilitative and supportive values of interpersonal relationships in the world in general.

A serious intent always characterizes groups at this point in the educational experience; participants take a great deal of care in the preparation of their inventories, and in their discussion of their own and others' views and feelings. Individuals, of course, participate to the extent that is meaningful and comfortable for them; a leader will note a considerable range in the apparent depth of involvement.

Instructions should suggest that, having considered a wealth of information about retirement, about the world in which it becomes defined, about some important attitudes, and having begun to look at change and life-style and development in more personal terms--we now want to move precisely into the question of how we, as individuals, project our values and goals into our lives in the future. State that this exercise is an opportunity to identify some personal resources for moving into the future, for realizing personal values in the context of a changing life. It is an opportunity to begin organizing those resources for action.

In the models shown above, two different forms are used. The traditional seven-question version is certainly the most commonly known, and the author uses it regularly in small interaction groups. Noting the intents mentioned above, distribute the form; advise participants to take some time for private thought, and to try to capture the responses that come to mind when they read a given question. Mention that some time will later be devoted to sharing some of the inventory information in smaller discussion units. In the usual manner monitor for completion; urge people to try to develop at least one response for each question. You may want to converse with someone who seems not to be writing much on the form, to make sure expectations are clear, and perhaps to move the person along conceptually. A leader should, however, avoid leaving any onus upon the occasional individual who seems truly unable to produce much in the way of written responses.

Subgroup options for discussion include like-sex trios or foursomes, married couples (individual with spouse) if group made up entirely of couples, or simply mixed-sex trios or foursomes. The smaller units allow for more discussion by each person, and they are more fittingly intimate in size for the quality of information being addressed.

In the reading-discussion workshop, a somewhat different (and longer) list of questions has been incorporated into one of the booklets used in the method (RPG Booklet 9). Conceptual linkages introducing the activity are the same as outlined above. The procedure, in this case, involves the individual's reading the booklet, and responding to the questions as they are encountered in the material. Discussion procedures are similar to those set out above; the author almost always re-assembles the like-sex subgroups constituted earlier for the fantasy discussion (capitalizing on certain continuity benefits). A quiet, reflective mood always characterizes a workshop group during the reading and writing portion; the discussions in the subgroups are always lively.

In both methods, the discussion units should be told to spend some time sharing what they wish of their reactions to the inventory, and of their responses to the questions. Suggest, again, the opportunity for helping each other, perhaps via some feedback or suggestion that will add to one's inventory information. Indicate that a good way to get started is to select a question and share answers all around; discourage the idea of one person's discussing his or her complete inventory at a time. In the context of these pre-retirement education methods, a trio or foursome will require about 20 to 25 minutes to satisfy its discussion interests in this material. A leader must monitor for

PERSONAL RESOURCE INVENTORY

The following seven questions are concerned with your values, and with your resources for implementing and realizing those values. Try to develop as many answers as you can for each question.

1. When do I feel fully alive? What things and experiences make me feel that life is really worth living. . .that it is great to be me and to be alive?

2. What do I do well? In what matters am I skilled, effective, capable? What do I do well for my own growth and well-being? What do I do well for others?

3. Given my current situation, and given my plans and hopes, what do I need to learn to do?

4. What wishes should I be turning into plans? Any dreams I have discarded as "unrealistic" that I should start dreaming again?

5. What under-developed or misused resources do I have? (Resources might be material things, or talents, or friends, and so on.)

6. What should I start doing <u>now</u>?

7. What should I stop doing <u>now</u>?

progress, sometimes inquiring of units how they are coming along; at some point, a warning for completion will be necessary. Do not allow discussion to continue too long after most have exhausted their involvement with the inventory information.

Personal Commitment to Action

Rationale. The ultimate connection between the pre-retirement education experience and the real world is individual action, or "planning behavior." Ideally, the participant will be motivated to take one or more steps in preparation for retirement. This last exercise intends to establish that "call to action" firmly in the participants thoughts as the program concludes.

The techniques used stem from the psychology of public commitment; presumably, an individual is more likely to carry out a behavior which he or she has openly avowed.

Procedure. At a point when all discussion activities have been concluded, prior to any procedural matters such as evaluation or official announcements, the facilitator asks each participant to think for a moment about one action that he or she will take, as a result of the pre-retirement program, in regard to planning the "rest of your life." (This activity very appropriately follows the Personal Resource Inventory.) Note that, from all of the topics and considerations raised in the program, each person should identify one specific action to be taken in the very near future, something that will continue the planning work begun in the program.

Tell participants to think quietly about this matter, and to write down their "commitments" on paper. When all have made a choice, instruct them to announce their commitments within their small discussion groups. The commitments should be successively announced around the group circle, without feedback or discussion. Monitor for completion and verify with each group present that the statements of commitment have been completed. This entire exercise normally takes less than ten minutes.

A leader will want to observe as many of the announcements as possible, perhaps in order to make linking reference to themes in his or her closing remarks.

3. Conclusion

Again, the author has assumed on the reader's part a familiarity with various areas of theory drawn upon by these methods (referenced especially in Chapter 2). The intent has been to provide a resource for the practicioner, not a treatise on structural issues. Certain ideas warrant review, however.

Both processes are viewed as task-oriented. The structure of each is developmental, rather than segmented; that is, both content and process are "progressive" in service to the general teaching/learning concept. In the case of program content, no chance is at work in the sequencing of topics; considerations move from the broad, externally fixed issues to the more specific, personally centered ones--from information about the world (perspective building) to information about the self (integration, decision-making, action). With respect to the processes, both methods utilize structured interpersonal activities to represent (actually and symbolically) a mutuality of concerns, availability of resource information, value of support systems, communication options, and so on.

In the case of the multi-group workshop, too, an underlying elemental structure is intentionally repeated throughout the process. Information is developed by the individual (spontaneously offered in discussion or stimulated by a structured activity); that information then becomes acknowledged in the discussion activity of the small group (support system); finally, the information is summarily represented in the small group's report of its deliberations to the full workshop (community). The author views this elemental structure as strongly reinforcing for the individual participant--especially concerning the private decision to participate actively and constructively in the learning experience.

Within either of these methods, the facilitator may wish to experiment with other exercises. Programs of these types have effectively used the life-line activity, the dream-home art activity, the pre-retirement interview role-play, and other exercises designed for small groups and workshops. Leaders often design new exercises. The ones discussed at length above in Part 2 of this chapter continue to be regularly used because they are truly effective.

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APPENDIX A

The "Amoeba" Concept

The following material reproduces a lecture originally developed by Frances I. Page for Manion (1975)*. The ideas utilized derive from Carl Eisdorfer's amoeba concept--a highly effective technique for talking about life-structure change in the second half of life. Page applies the amoeba concept as a framework for examining role adjustments, loss, and restructuring tasks that become especially signalled by the idea of retirement. In reference to other program content, the amoeba concept is commonly used as a positive approach to aging/mental-health questions, and as a helpful addition to a healthy perspective about life-course development. Though appearing quite simple conceptually--and even playful at the outset, the ideas never fail to be thoughtfully received and appreciated by the audience of pre-retirement age.

Typically, the presentation develops in two major parts--only the first of which is included in the material here. That first part is concerned with setting out the concept as a system for representing and discussing life-structure changes. In the second part, Page, the author, and others commonly apply the ideas to an example (a person in the presenter's own life experience), in order to illustrate the scope and pace of change that can be associated with the "late-adult transition." Presenters using this technique always offer examples that illustrate both critical loss and positive restructuring; this part of the lecture seems always to strike a deeply felt and recognized chord among the audience.

The amoeba presentation in these two parts generally requires 25 to 30 minutes, with the questions and comments that arise. In the program models outlined in this manual, specific attention to the ideas developed in the presentation is not extended into any following activity (such as discussion, or an amoeba-drawing exercise, for example); facilitators who have pioneered the use of the concept in PRE programs believe that the message is a highly individualized one, and that it is effectively left with the individual for deliberation and integration.

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*U. V. Manion, Description of a Pre-Retirement Planning Seminar for Senior Employees and Spouses, Eugene, Oregon, Retirement Services Incorporated, 1975. (The material is reproduced here with the permission of the publisher.)

The lecture is presented in the manner of a "chalk talk." Participants are called upon at different points to contribute information that furthers the ideas being developed (such as in naming the characteristics of the "play dough" and the "silly putty," and in designating the assorted roles that define the adult life-structure. A reading of the lecture itself, immediately below, will clarify the use of both the audience's participation and the amoeba drawings.

Dr. Carl Eisdorfer, head of the department of psychiatry at the University of Washington Medical School, has developed what is called the amoeba theory of personality. An amoeba, you may remember, is a microscopic, one-celled animal most of us met in high-school biology. An amoeba has two parts--an inner nucleus, and an outer layer which has many protrusions, or "bumps."

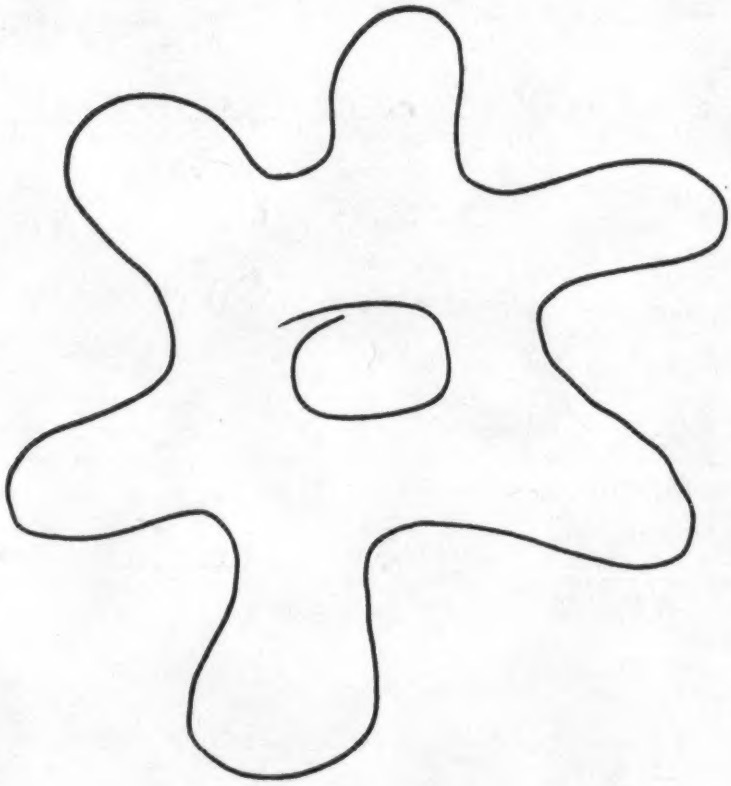

Figure 1

Dr. Eisdorfer suggests that the human personality can be represented by an amoeba, whose outer layer consists of "play dough," and whose inner nucleus is made up of "silly putty.". How many of you have had experience with "play dough"? How many with "silly putty"? Good--then you can help me list some of the characteristics of these two substances. (Pause to list characteristics on board as shown in Figure 2.)

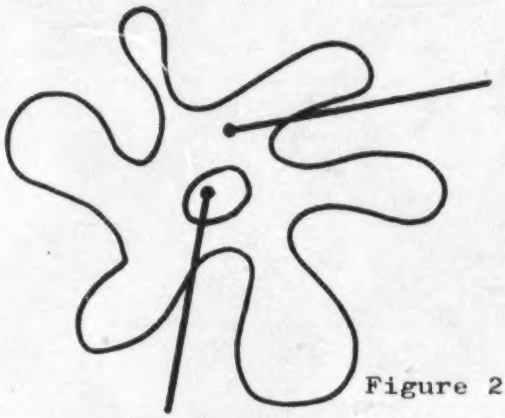

Figure 2

"PLAY DOUGH"

1. colorful - many colors.
2. soft - pleasant to touch.
3. malleable/pliable - can take on many shapes.
4. holds its shape well.
5. will harden and dry if left unattended.

"SILLY PUTTY"

1. bouncy/resilient - a ball of it will bounce if thrown gently.
2. takes imprints (information), if pressed on written material, for example.
3. needs to be used and stimulated - will simply become shapeless if left unattended.
4. needs to be contained (protected) - can shatter if struck too sharp a blow.

The reasons these two substances were chosen for use in the theory is that they suggest characteristics which we humans have. On the outside, people <u>are</u> varied and colorful; each person's "bumps" are a little different from the next person's. People are also malleable. They are shaped by their experiences, by the physical environment they live in, and by the psople with whom they come into contact. This stimulation keeps a person malleable and adaptive. However, if a person becomes isolated from other people and ideas, he or she might cease to change and adapt. One may become dried and hardened just like the "play dough" that is left out and unused. We might say of such a person that he has become "fixed in his ways."

In each person there is also an inner core of the personality which is more stable over time than is the outer layer. It is this inner part that sustains the person, that gives one the sense that he or she is the same person from day to day and from year to year. This inner core--made as it is of "silly putty"--has some very interesting properties. It is, by its nature, bouncy and resilient, as long as it receives the proper care. The inner core needs the outer layer of "play dough" to act as a buffer, protecting the inner core from the full impact of life-crises that might shatter and destroy it. At the same time, the outer layer must transmit stimuli from the environment so that the "silly putty" core is constantly nudged and attended and used. Without the outer layer, the inner core would collapse into a shapeless mass, as does "silly putty" if left out of its container and unattended. Now, are there any questions about the theory so far? Do you find these distinctions meaningful? (Erase Figure 2, and replace it with a fresh amoeba, <u>without the labeling</u> of bumps as shown; the labels are added as the lecture continues below.)

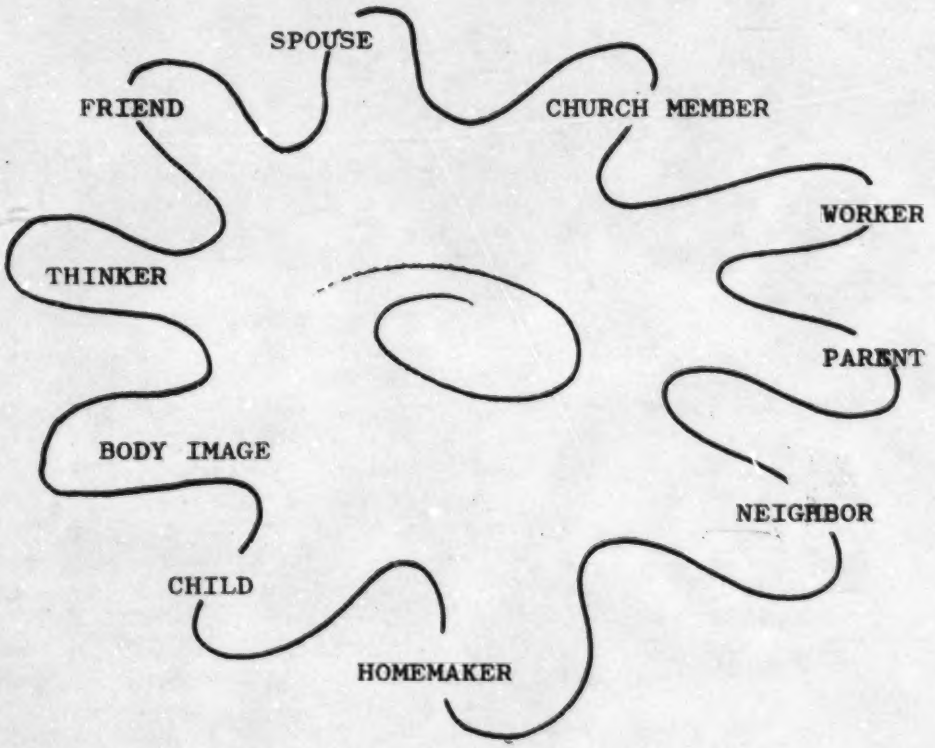

Figure 3

Another aspect of the amoeba theory is that each of these bumps can be thought of as a role that one plays in life. Most adults play many roles, such as parent, club member, citizen, and so on. Can you give me some other roles that an adult might play? (Label roles as suggested by participants.) Good. There are probably many others we could name, but these are enough to give us a picture of the different roles a person can play (be sure the picture includes the roles listed below, though it should not be limited to those roles).

One of the things that happens to people as they grow older is that many of the roles they have developed and invested in during their lives may be lost or markedly changed. For example (as each role is discussed, erase the bump representing it):

(1) Parent. As children grow up and leave home, the role of the parent is usually reduced and always changed.

(2) Child. As adults grow older, they are increasingly likely to experience the deaths of their own parents.

(3) Spouse. As people age, the likelihood of becoming a widowed person increases. Health problems can also alter the marriage relationship.

(4) Body Image. For the "beautiful woman" or the "he-man," the effects of aging may be very difficult to accept. Health problems also present difficulties here.

(5) Friend. Friends may move away or may die, or the person himself or herself may decide to move.

(6) Worker. Usually, of course, this role ends formally with retirement.

Thus the process of aging may leave a person with hardly any "play dough" exterior (Figure 4). In such a state, one might become vulnerable to new life stresses. Too much change too fast might shatter the inner core of unprotected "silly putty." Or such a person might be

especially subject to that loss of shape (deterioration) that we noted can happen to the "silly putty" when left unstimulated.

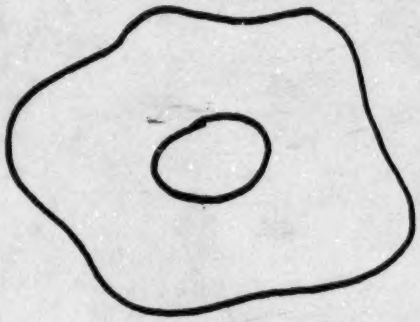

Figure 4

The effects of aging may be even more devastating to individuals who did not develop many bumps to begin with (Figure 5). For example, retirement can be an overwhelming experience for a man who has been almost totally career-oriented.

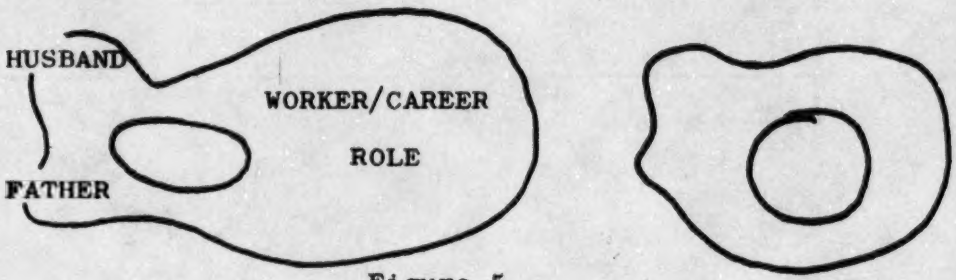

Figure 5

A housewife who has lived principally for her family may be equally vulnerable if she finds herself widowed after her children are grown (Figure 6).

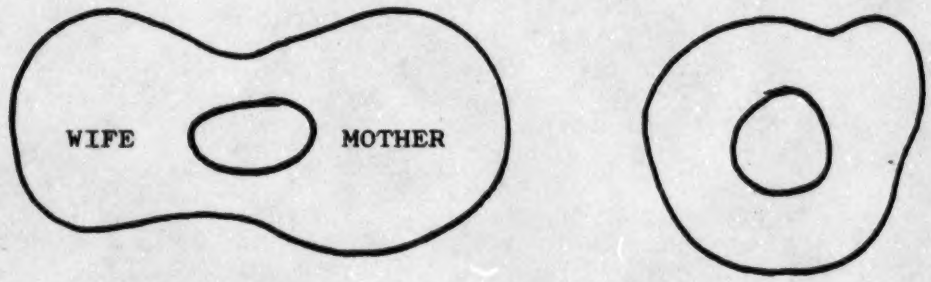

Figure 6

But the picture does not have to so bleak. People of any age are capable of participating in the building and remodeling of their personalities. Roles which have been lost or reduced can be replaced by new roles, or by the expansion of old ones (draw a fresh amoeba). Let's name some roles you find yourselves or others around you adding, or planning to add as you prepare for retirement (label bumps, Figure 7).

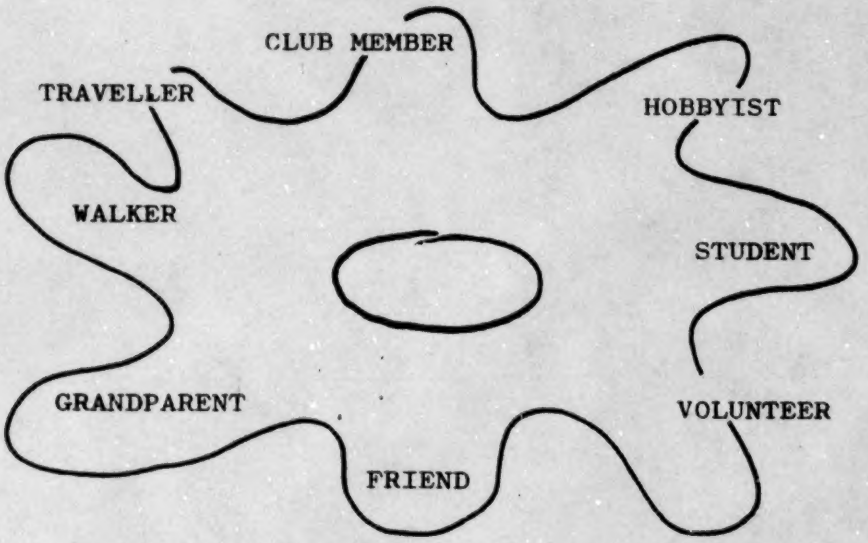

Figure 7

Ideally, change comes gradually, and the expansion and addition of roles occurs continually throughout the life cycle. The amoeba shows us that we can anticipate certain change, and perhaps that it is wise to consider our own needs for some expansion and addition of "bumps" before we might be caught by too much change. In this sense, the "third age" of life can be a period of renewal and development, rather than a period of crisis and decline.

APPENDIX B

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ABOUT RETIREMENT--AND PRE-RETIREMENT EDUCATION

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APPENDIX C

Oregon Center for Gerontology
1627 Agate Street
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Ruth Drewer, Librarian Summer, 1977

SELECTED FILMS ON AGING

NOTE: We offer a list of films most readily available to northwest users. A more complete catalog of films on aging is for sale by the Ethel Percy Andrus Gerontology Center, University of Southern California. The Andrus catalog is available for use in our Resource Center. See final page of this bibliography for addresses of film distributors.

AFTER AUTUMN: (See White House Conference films)

AGING: 22 min., color. 1973 (Specify CRM films)
This film explores a variety of patterns of aging through interviews with individuals whose life styles are different. Common stereotypes are examined. Comments by Vern Bengston, Andrus Gerontology Center, USC.

Available: CRM Educational Films
Del Mar, California 92014

AGING: THE SEARCH FOR ETERNAL YOUTH] 22 min. color. 1972.
Examines the ways in which the affluent older population grasps at youth through questionable rejuvenation schemes. Some comments by Robert Butler, psychiatrist, on society's need to recapture the sense of a whole life cycle in contrast to our present youth-oriented culture.

Available: U of C Extension Media Center
Rental, $25.00

ALL HAND WORK. 15 min., color, 1970.
Portrait of Jenes Cottrell, 73-year old mountain artist who plays his banjo and sells homemade whistles, billy clubs, bull roarers, and rolling pins at music festivals and craft fairs throughout West Virginia. Shows Cottrell at home in his workshop demonstrating his foot-operated lathe (no electricity in home or workshop). Cottrell tells how he started woodworking and it becomes obvious that he has great respect for traditional ways and of his own ability to transmit them. He performs and describes the construction details of his banjo, fashioned from automobile transmission and hand carved walnut for the neck.

Available: U of C EMC Rent $17
Sale $195

THE AMUSEMENT PARK: 16 mm color, 27 min.
The amusement park in the title is society. This is an allegory about an aging man in an alien world. Because the message is negative, powerful but sometimes obscure, we suggest that you preview before showing.

Available: Oregon State Program on Aging, Free.

ART OF AGE: 27 min., color, 1970.
A positive portrayal of aging. The lives of four individuals are portrayed each narrating his own segment. These are active, involved people of very different backgrounds with very different adaptations.

Available: ODCE $10.75 , Syracuse U., rental.
ACI films, sale.

AT 99: 24 min., 16 mm color.
Affectionate portrait of Louise Tandy Murch, an energetic and optimistic woman of 99 years. Shows her at her birthday party, going about her daily chores in her home, doing yoga exercises, and playing piano to entertain residents of a home for the aged.

Available: U. of C., EMC
Rental, $24.00

BUBBY: 5 min., 1968.
Brief, sensitive portrait of an old woman by a young film maker - an 18 year old high school senior. This film expresses his love and respect for his grandmother and provokes fresh thought about aging.

Available: U. of C., EMC.
Rental, $10.00

DON'T STOP THE MUSIC: 17 min., color.
" An upbeat film showing active older people and pointing out that many more could be active and as happy in their later years with just a little help." Produced by AOA from outtakes of WHC films plus some new footage.

Available: State Agencies on Aging, free.

INSIDE-OUTSIDE: 29 min., BW. University of Iowa. , 1968.
Films the feeling of old age and has no other message than the reality of growing old.

Available: ODCE rental $ 8.75.
Iowa (Rental and Sale)

I THINK THEY CALL HIM JOHN: 10 min., 1970
Shows typical lonely day of elderly man--watching TV, staring out the window, fixing meals. A moving portrayal of the emptiness and monotony of solitary life.

Available: U. of C., EMC., $13.00

LEGAULT'S PLACE] 10 min., BW. 1965.
Portrays elderly blind man who wants to be left in peace with memories in the familiar comfort of his old cabin. The city builds around him and he must move.

Available: National Film Board of Canada (Producer)
ODCE rental $5.00
U. of O. Library, IMC, for campus use.

NELL AND FRED: 28 min., BW.
A penetrating look at an issue that confronts people when age and infirmity make them most vulnerable. Nell, over 80, and Fred, in his 90's, must choose between doing for themselves as best they can or moving to an old people's home.

Available: McGraw-Hill/Contemporary, rental $17.00
ODCE $8.75

NEVER GIVE UP: IMOGEN CUNNINGHAM: color 28 min.
"Affectionate portrait of the noted photographer at 92; shows her at home and walking around picturesque locales in San Francisco as she recounts her life and discusses her family, friends, photography, thoughts about death, and other topics...." Catalog annotation.

Available: U. of C., EMC, rental $26.00

NEVER TRUST ANYONE UNDER 60: (See. White House Conference films)

NOW IS FOREVER: 53 min. color, 1972.
"Vignettes and interviews illustrate the positive aspects of the lives and philosophies of a number of active, vibrant senior citizens, among them the noted photographer, Imogen Cunningham, a 105-year-old waiter who jogs several miles each morning, an 80-year-old man who has found a new career as a model in an art school, and a woman involved in the struggle for senior citizen rights. Segments show San Francisco's social services to the elderly.+ Catalog annotation.

Available U. of C., EMC, rental $37.00

OCCUPANT IN THE SINGLE ROOM: 20 min. color. 1974
"Reveals the deplorable conditions in one of New York City's remaining single room-occupancy hotels, in which many elderly people whose fixed incomes are below the national poverty level must reside. Documents the fire and health code violations, the lack of heat and hot water--tenant's fears that the hotel will be closed, forcing them into the streets." Catalog annotation.

Available: U. of C., EMC, rental $20.00

OF TIME[WORK AND LEISURE: 30 min., BW. 1963.
Based on Sebastian de Grazia's study of our work oriented society which may have lost the ability to enjoy true leisure--a time to think without pressure, rest, wander aimlessly, take stock of ourselves in the world.

Available: ODCE, rental $8.75
Indiana U., Boston U., California U., Illinois U., Syracuse U.

OLD[BLACK AND ALIVE: 28 min., color 1974.
Produced by the National Center on Black Aged. Filmed and directed by Frank Canton.
Seven portraits: doctor, real estate agent, farmer, etc.
"A beautiful thoughtful film--full of humor and love"
Film Library Quarterly

Available: U. of C. EMC Rental, $25.00
Project on Aging, U. Washington
1417 N.E. 42nd St.
Seattle, Washington, 98105

OLD MYTHS[NEW REALITIES: Videocassette, 60min.
This program looks at several myths that effect social reaction to the aging process and explores major theories about aging. Featured are nine Pennsylvanians ranging in age from seven to ninety, as well as experts in the fields of gerontology, geriatrics, and social services.

Available: The Pennsylvania State Univ.
Audio-Visual Services
17 Willard Building
University Park, PA. 16802
Rent, $7.00
Sale, $104.00

OLD ONE'S: 28 min., BW. 1964
Pioneer work of Denmark in programs for the old. The testing of different approaches and systems--nursing homes, old people's towns and home care.

Available: ODCE, rental $8.75
Oregon Board of Health
Columbia UCMC
U. of C., EMC, rental $11.00

ONE TIME AROUND: 16 min. color, 1974

"Finding meaning and direction in life and accepting the inevitability of death with dignity and grace challenges each human being. A young man comes to grips with these sensitive issues while assisting in a retired citizens' program." Catalog annotation

Available: ODCE, Rental $10.50

PEEGE: 28 min., color

Deals with a family's adjustment to the institutionalization of the grandmother in a long-term care facility; the subject is sensitively handled by a cast of recognized professionals (Bruce Davison, Jeanette Nolan, Barbara Rush). A middle-aged couple, s ns 13 and 17 go to visit Grandma in the nursing home at Christmas. Flash-backs used to contrast Grandma as active middle-ager vs. confused nursing home patient.

Available: U. of C., EMC, rental $20.00
U. of O., IMC, (local use only)

PENSIONS: THE BROKEN PROMISE] 38 min., color. NBC Reports Series., 1972.

About private pension plans. Illustrates through experiences of a teamster the misconceptions about pension portability and vesting. After a full work life in a number of chapters of the union, the truck driver discovers he can only collect a pension on the latest job. Film offers no solutions.

Available: ODCE, rental $22.00
U. of C., EMC, rental $27.00

POSITIVE PRE-RETIREMENT PLANNING: A TEACHING MODEL: 16 mm. 27 min., color/sound., 1977

"This documentary of a class conducted by the University of Oregon Center for Gerontology presents a teaching model soundly conceived and tested. It provides the counseling trainees with appropriate information and a methodology that takes full advantage of the lifetime experience of the pre-retirees. This film is most effective when presented after a showing of its companion film, Retire? Who? Me?".

Available: Maddron and Maddron (producers)
1949 E. 28th Ave.
Eugene, Or, 97403
Rental: $30.00
Sale: $275.00

RETIRE? WHO? ME?: 16 mm, 31 min., color/sound, 1976
"A film for everybody who expects to retire one day, as well as for those who are training as professional counselors. Participants in a class in preretirement planning at the University of Oregon Center for Gerontology share worries, information, and anticipation as they talk about planning a major portion of their lives. Retire? Who? Me? is a companion film for Positive Preretirement Planning: A teaching Model."

Available: Maddron & Maddron (producers)
1949 E. 28th Ave.
Eugene, Or. 97403
Rental: $35.00
Purchase: $320.00

THE PRIORY METHOD: 20 min.,;color.
This film is factual and unique documentation which shows the very old and regressed residents being motivated and strengthened sufficiently to leave beds and wheelchairs for a more stimulating and normal way of life. A homespun story which shows how this reversal was accomplished. Purposeful activities in which volunteers (all ages) and staff are involved to make the hospital and the residents an integral part of community life. The simple and economical day to day activities are woven around all calendar events, social functions, staff celebrations, family and resident anniversaries and religious services. All are status enhancing experiences which provide new and meaningful roles; truly a living example of psycho-social care.

Available: ODCE, rental $10.50

REST OF YOUR LIFE: 28 min., color. 1970.
Examines a typical group of workers of all age groups and explores with them the factors to be considered in retirement planning - where to live, how to use leisure, financial planning, etc.

Available: Illinois U., Syracuse U., rental.
Administration on Aging, Washington, D.C. 20201 (free use)
Altshul (sale)

RIGHTS OF AGE: 28 min., BW. Mental Health Film Board. 1967.
Protective services for the aged.

Available: ODCE, rental $8.75

SEASONS: See White House Conference on Aging Films.

SPRINGTIME OF AUTUMN: 20 min., color. Oregon Center for Gerontology. 1971
A beautiful and moving documentary on the Foster Grandparents at Fairview Hospital and Training Center for mentally retarded children in Salem, Oregon.

Available: ODCE, rental $8.75 also, U. of O. IMC
Oregon State Program on Aging (in-state-use)

STEP ASIDE STEP DOWN: See White House Conference on Aging films.

STRING BEAN: 17 min., BW, or color. CAPAC MGHT] 1965.
An elderly woman tends her string bean and plants it in the Jardin de Tuilleries.

Available: ODCE, rental $8.75
Syracuse U., rental
MCGraw-Hall/Cont. (rental and sale)
U. of C., EMC., rental $17.00

THAT THE LAST BE BEST: See White House Conference on Aging films.

THAT'S WHAT LIVING'S ABOUT: 18 min., color, 1973.
Lively but philosophical look at leisure - what it means how it affects our lives now and in the future. Explores the uses and misuses of leisure in this mass-production computerized, assembly line society. Presents broad concepts of leisure and recreation, balance between work and leisure, leisure and retirement. Produced by City of Torrance, California Parks and Recreation Dept.

Available: U. of C., EMC, rental $19.00

THE THERAPEUTIC COMMUNITY: 28 min., color.
Summarizes practical outcomes of efforts of Division of Gerontology, University of Michigan , to learn ways older people in mental hospitals can be rehabilitated. Filmed at Ypsilanti State Hospital.

Available: University of Michigan Television Center
310 Maynard Street
Ann Arbor, Mich. 48104
Rental: $15.00
Sale: $175.00

THIS IS THE DAY I GO TO SCHOOL: 15 min., Tigard, Oregon Public Schools.
This film is about senior citizen involvement in Tigard, Oregon schools.

THREE GRANDMOTHERS: 28 min., BW.
The similarities and differences in the roles of grandmothers in three cultures, Nigerian, Brazilian and Canadian are portrayed in this film.

Available: U. of C., EMC, rental, $14.00

THE THIRD AGE: THE NEW GENERATION] 16 mm., 15 min., color.
Produced by National Benevolent Association, 115 North Jefferson, St. Louis, Missouri, 63103.
A positive statement on aging and retirement, the film challenges older adults to look forward to change and new involvement.

Available: Rental, $8.00 with free study/action guide
Audio Visual Services
P.O. Box 1986
Indianapolis, Indiana 46206

TIME FOR LIVING: 16 mm., 10 min., color, 1975;
"Moving from the past...to present...to future, the effect of time and change are poetically explored. Sometimes change can cause anxiety and pain. Often anticipation of change is worse than change itself. But change can also be a challenge...and provide 'A Time for Living'. Positive and upbeat, Ray Dolger enhances this film with warm and empathetic narration. His final, whimsical comment captures the essence of the positive 'retirement' feeling." Distributors' annotation.

Available: Center for Instructional Media and Technology
Univ. of Connecticut
Storres, Conn. 06268
rental $3.50
sale $200.00

TO A GOOD[LONG LIFE: 20 min., color, 1976.
"Portraits of three elderly people living vigorous, interesting lives. One is a hod carrier in the construction industry who runs 17 to 20 miles each day; he remarks that he's 'almost ashamed to feel so good at such an age.' Mitsu Yashima, a Japanese-American artist and teacher at a community art center is shown working, visiting with friends, and helping her elderly students. She speaks sensitively about the benefits of experience and the joys of aging as does Jack Collison, an articulate and congenial poet." Catalog annotation.

Available: U. of C., EMC, rental $21.00

TO LIVE 'TIL YOU DIE: 60 min., BW . NET. 1965
Two contemporary and contrasting western views of aging Old age viewed as a social problem (Sweden) and as a traditional family problem (Italy).

Available: ODCE rental $12.25

TO LIVE WITH DIGNITY: 30 min., color.
"Shows a special low-cost treatment program designed for use in nursing homes and mental hospitals about frail very confused and disoriented elderly who can be helped to help themselves to live with dignity."

Available: University of Michigan Television Center
313-764-8298
Rental: $15.00
Sale: $200.00

TO AGE IS HUMAN: WPSX-TV Series
To Age Is Human is a comprehensive documentary series on aging consisting of four one-hour audiovisual programs. The series was produced for the Pennsylvania Public Television Network by Penn State's Division of Broadcasting, WPSX-TV, with technical consultation provided by the Gerontology Center. The hour-long programs are now available for rent or purchase in 16 mm sound film and/or videocassettes. Program titles and descriptions include the following: (see titles cards for descriptions)
OLD MYTHS[NEW REALITIES] Videocassettes. Sale $104, Rent $7.
NEVER TOO LATE-Videocassette Sale $104, Rent $7
THE FACES OF 'A' WING[16 mm. Sale, $290, Rent $14
THE FINAL[PROUD DAYS OF ELSIE WURSTER
16 m.m. Sale $290, Rent $14
Videocassette, Sale $104, Rent $7

Available: The Pennsylvania State Univ.
Audio-Visual Services
17 Willard Building
University Park, PA, 16802

THEIR SPECIAL NEEDS: 15 min., color.
About the Foster Grandparents program in various locations as the grandparents relate to children in a nursery for low birth-weight infants, in a school for mentally retarded and in a correctional school for boys. (Action Film)

Available: Fred McFarland (free)
c/o Photo & Sound Service
1205 North 45th St.
Seattle, Washington 98103
or: State Program on Aging

WHAT YOU DO SPEAKS SO LOUD: 15 min., color
The satisfaction of those who give and those who receive in the RSVP program. Volunteers discuss their rewards. (Action Film)

Available: Fred McFarland (free)
c/o Photo & Sound Service
1205 North 45th St.
Seattle, Washington 98103
or: State Program on Aging

WHY MUST OUR ELDERLY DIE ALONE? 16mm. 29 min., color.
"This film suggests how--and why--we must regain some of the age-old meaning and richness of the experience of dying. It has much to offer health-care professionals, as well as the dying patient, his family, and his friends." Brochure annotation.

Available: Maddron & Maddron (producers)
1949 E. 28th Ave.
Eugene, Oregon 97403

WE'VE COME OF AGE: 12 min., BW, or color
Walter Able, 76-year old actor narrates this film which recounts the accomplishments of the generation now "old" and exhorts them to unite for their common good. Winner of the TV Festival of New York gold medal for best public service film.

Available: National Council of Senior Citizens
Film Section
1511 K St., N.W.
Washington, D.C. 20005
Rental: $3.00

WHEN PARENTS GROW OLD: 16 min., color. 1972
"Searching for values series. Edited from the motion picture, 'I Never Sang For My Father". Faced with the problem of a suddenly widowed father whose health is failing, a young man on the verge of marriage must decide where his responsibilities lie."

Available: ODCE Rental, $10.00

WOO WHO? MAY WILSON: 33 min., color. Amalie R. Rothschild. 1969.
Lively portrait of a 63-year old former "wife-mother-housekeeper-cook" who moves to New York from the country to create a new life. Animated opening sequence shot from comic photographs May Wilson has taken of herself in a booth. Her commentary reveals the change from terrified lack of confidence to self-assurance and a more rewarding life.

Available: U. of C. EMC, Rental $26.00

1971 WHITE HOUSE CONFERENCE ON AGING FILMS:

After Autumn, 10 min., color. Depicts isolation of old farmer, widowed and fiercely independent.

Never Trust Anyone Under 60: This is the nearest thing to the White House Conference on Aging total media production. The film includes dramatic scenes, plus all of Step Aside Step Down and After Autumn. Also three brief film sequences--The American Dream, Throw Away Culture and Falling Through the Cracks.

Seasons: 16 min., color. Primarily about health problems of older people.

Step Aside, Step Down: 20 min., color. Presents problems and some private and governmental solutions on housing, nutrition, transportation, etc.

Also: Five short films were produced by the University of Michigan Television Center, 310 Maynard St., Ann Arbor, MI 48108. These films are 16 mm color and are 2-3 min. each. They are designated "trigger films: to be used as springboards for discussion."

To Market, To Market: What do we do with food stamps?

Mrs. P: The volunteer who is no longer needed.

The Center: Young and old, will they share space?

Dinnertime: Tea, Toast and Spode.

Available: Films for the White House Conference on Aging listed above are available from each state agency on aging (Oregon State Program on Aging, Public Service Building, Salem, OR 97310) or loaned or for sale from Sales Branch, National AV Center, National Archives and Records, Washington, D.C. 20409.

YOU'LL GET YOURS WHEN YOU'RE 65: 40 min. color. 1973

"Traces history and documents inadequacies of the Social Security and Medicare systems, includes interviews with many retired people and shows some shocking cases in which benefits have been stopped because of legal technicalities. U.S. social, health and retirement benefits are put into perspective by comparing them to the enlightened programs of West Germany. Comments on the policies of Congress and Federal Administrators." Catalog annotation.

Available: U. of C. EMC., rental $33.00

FILM-STRIPS

HOW WOULD YOU LIKE TO BE OLD?

"Do our feelings about death influence society's treatment of the elderly? Explores economic and psychological penalties our culture imposes on old people; challenges students to consider more humane policies and attitudes" 2 film strips, 2 cassettes, $48.50, discussion guide.

Available: Lane Council of Governments, Public Service Building, Eugene, Or., 687-4283
Guidance Associates, 757 Third Avenue, N.Y. 10017 (for purchase)

PERSPECTIVES ON AGING: (Series)

5 filmstrips approx. 20 min. each. 35 mm.

"Designed, primarily, for health care personnel, the materials in this series make up a comprehensive study of the elderly and their problems, and provide innovative, in-depth solutions."

Filmstrip 1. Myths and Realities. Presents common misconceptions about the aged, and realistically explores financial resources, health, housing, transportation, retirement and social roles.

Filmstrip 2. Physical Changes and Their Implication. Examines the physical changes that accompany aging and the manner in which the body systems and functions are affected by them.

Filmstrip 3. Implications for Teaching. Surveys the physiological, sociological, and psychological factors which influence the elderly and affect their learning and presents specific teaching techniques which are effective with the elderly.

Filmstrip 4. The Confused Person: Approaches to Reorientation. This program focuses on the difficulties of caring for the aged, confused person. It differentiates between functional and organic disorders, and between reversible and irreversible brain syndromes.

Filmstrip 5. "Old People's Home" - A Poetic Essay on Aging. Intended for the broadest of audiences, this emotional impact program may be used separately for many varied classes. It is a dramatic photographic essay of W.H. Auden's poem, "Old People's Home," and brings into question our growing cultural practice of putting the aged away into "homes" where, often, they are unseen and forgotten.

Available: Concept Media
1500 Adams Ave.
Costa Mesa, CA 92626
(714) 549-3347
Purchase: (Complete series with records)
$252.00 (Complete series with cassettes)
$267.00

Campus, U. of O. use only, Library Audiovisual Filed: F.S. Kit 100, (with records), needs Dukane projector.

ADDRESSES OF FILM DISTRIBUTORS

ACI	Aci Films 35 W. 45th St. New York, N.Y. 10036
Altschul	Gilbert Altschul Productions 909 W. Diversey Parksway Chicago, Ill. 60614
Boston U.	Film Library Boston University 765 Commonwealth Ave. Boston, Mass. 02215
U. of C. EMC	Extension Media Center University of California Berkeley, California 94720
FI	Films Incorporated 1144 Wilmette Avenue Wilmette, IL 60091
IFB	International Film Bureau 332 S. Michigan Ave. Chicago, IL 60604
Illinois U.	Visual Aids Center University of Illinois Division of University Extension Champaign, IL 61820
Indiana U.	Audio-Visual Center Indiana University Bloomington, IN 47401
Iowa U.	Iowa State University Film Production Unit Alice Norton House Ames, IA 50010
McGraw-Hill/Cont.	McGraw-Hill/Contemporary 1714 Stockton St. San Francisco, CA 94133
Maddron & Maddron	Maddron & Maddron 1949 E. 28th St. San Francisco, CA 94133
State Program on Aging (Oregon)	Oregon State Program on Aging 772 Commercial St. S.E. Salem, Oregon 97310

ODCE	Audiovisual Instruction 1633 S.W. Park Ave. Portland, OR 97207
Oregon State Board of Health	Oregon State Board of Health Health Education Section 1400 S.W. Fifth Ave. Portland, OR 97201
Penn State	Penn State AV Services 17 Willard Building University Park, PA 16802
Syracuse U.	Film Rental Center Syracuse University 1455 East Colvin St. Syracuse, N.Y. 13201

INFORMATION ON RENTAL PROCEDURES

1. Write or telephone listed source allowing at least three weeks. Indicate use date or dates.

2. Print shipping and billing instructions. Include purchase order if required before bill can be paid.

APPENDIX D

This additional set of blank exercise forms is included for reproduction uses. These forms are in general circulation and are freely reproduced by facilitators for program use. The origin/authorship of any form, where known, has been noted in Chapter 3.

SENIOR EMPLOYEES QUESTIONNAIRE: Will you please indicate how you feel about the statements listed below by placing an "X" in the column which best describes your feelings in each case.

Your Sex (circle) M F Code _____

	Strongly Agree	Agree	Disagree	Strongly Disagree
I have made many plans for things I'll be doing in retirement.				
The things I do are as interesting to me as they ever were.				
Retirement will probably be the dreariest time of my life.				
I expect some interesting and pleasant things to happen to me in retirement.				
I expect retirement to be the best years of my life.				
I'll probably find a hard time keepimg busy in retirement.				
As I grow older, things really seem better than I thought they would be.				
I feel old and somewhat tired.				
My life is full of worry.				
Things seem to be getting worse for me as I get older.				
My life could be happier than it is now.				

	Strongly Agree	Agree	Disagree	Strongly Disagree
Retirement is generally bad for a person.	_____	_____	_____	_____
People should retire only when they are no longer able to work.	_____	_____	_____	_____
Retired people do not generally receive the respect they deserve from younger people.	_____	_____	_____	_____

MARK ONE ANSWER:

I would say that

___I look forward to retirement very much

____I am indifferent about retiring

____I dislike the idea of retiring

If I had my choice

____I would retire as planned

____I would keep on working

____I would have retired earlier

RETIREMENT-RELATED ATTITUDES AND BELIEFS, AS MEASURED BY THE SENIOR EMPLOYEES QUESTIONNAIRE

Attitudes Toward Retirement

	National Research Sample*	Pre-Retirement Workshop Group
Negative	37%	
Average	29%	
Positive	31%	
No Response	3%	
Total	100%	100%

Beliefs About Retirement

	National Research Sample*	Pre-Retirement Workshop Group
Negative	26%	
Average	46%	
Positive	24%	
No Response	4%	
Total	100%	100%

From U. V. Manion, Company Policies and Early Retirees Experiences, Doctoral Dissertation, University of Oregon, 1969.

RETIREMENT CONCERNS

The factors listed below are related to retirement adjustment. Please rank the items according to how you foresee them as problems in retirement.

For example, if you consider boredom the most worrisome of the list, give it the rank of 1 by placing a 1 in the MY RANKING column; if you think marital relationship the next greatest concern, give it the rank of 2. Use all of the numbers 1 through 10, and use each number only once.

Your discussion leader will explain the use of the GROUP RANKING column.

	MY RANKING	GROUP RANKING
Boredom	_____	_____
Living Arrangements	_____	_____
Feelings of Worthlessness	_____	_____
Health	_____	_____
Finances and Standard of Living	_____	_____
Marital Relationship	_____	_____
Loneliness	_____	_____
Loss of Work Relationships	_____	_____
Death and Bereavement	_____	_____
Legal Affairs in Poor Shape	_____	_____

FINANCIAL EXPECTATIONS & PLANS: Please answer these questions for your own personal reflection. This questionnaire is for your own private use, and you are not expected to share this information.

1. What do you anticipate your standard of living will be in retirement? Do you expect it to be higher, lower, or about the same?

   Higher_____ Lower_____ About the same_____

2. Will you have income sources or reserves in addition to your pension and Social Security?

   Yes_____ No_____

3. Have you determined, or estimated closely, what your retirement income will be?

   Yes_____ No_____

4. How do you feel about the adequacy of that income? Will it be:

   More than enough_____
   Less than enough_____
   Just enough _____

5. Are you concerned about being able to meet future changes in living expenses, or emergencies?

   Yes_____ No_____

6. How much planning would you say you have done with respect to retirement income and finances?

   Made many plans _____
   Made a few plans_____
   Made no plans _____

7. What matters do you need to investigate to shed some light on your retirement financial picture?

_____

_____

_____

_____

_____

GUIDED FANTASY DAY

(questions to be narrated)

A day, for example, two years after retirement (or spouse's retirement)...and we will say it is a Tuesday...

1. What year is it?
2. When did you get up today?
3. How's the weather?
4. Where are you living?

   ...in what geographic area?
   ...is it in the country, a town, or a city?
5. What kind of a residence are you living in?

   ...is it the house you were in when you retired?
   ...or is it an apartment, ...a condominium, ...a mobile home?
6. If you have children, how old are they now?

   ...are they all married?
   ...what are they doing?
   ...where are they living?
7. Are your parents still living?
8. With whom are you living?
9. How have you spent your morning?
10. What will you have for lunch?

    ...who will prepare your lunch?
11. Today, what things will you do for yourself--just for your own enjoyment, or satisfaction, or well-being?
12. What will you do this afternoon?
13. How will you spend this evening?
14. What do you do for others?
15. Besides your spouse, with whom do you spend time?
16. How is your health?
17. How is your spouse's health?
18. In your reflections today, what things in your life did you think about that were of special importance to you?
19. What are you looking forward to? What goals or plans do you have for the future?

ACTIVITIES INVENTORY

Instructions: Please read each item and check for both frequency and enjoyment.

	Frequency of Activity			Enjoyment of Activity		
	Often	Some-times	Never	Very Much	So-So	Dislike
1. Playing cards						
2. Shopping						
3. Attending movies or theaters						
4. Visiting amusement parks						
5. Doing art or craft work						
6. Attending large social functions (church dinners, lodge dinners, etc.)						
7. Attending small social entertainments (dinner parties, etc.)						
8. Newspaper reading for pleasure						
9. Magazine reading for pleasure						
10. Book reading for pleasure						
11. Getting together or talking with family or relatives						
12. Attending church and other religious organizations						
13. Reading of Bible or other religious instruction						

	Frequency of Activity			Enjoyment of Activity		
	Often	Some-times	Never	Very Much	So-So	Dislike
14. Fairs, exhibits, etc.						
15. Going out with spouse or partner						
16. Entertaining at home						
17. Dancing						
18. Informal contacts with friends or neighbors						
19. Attending lectures (political, adult education, etc.)						
20. Listening to radio or TV						
21. Odd jobs at home						
22. Attending club meeting						
23. Working on club projects						
24. Golfing						
25. Bowling						
26. Hiking						
27. Planned walking						
28. Picnics						
29. Playing musical instrument or singing						
30. Purposely sitting down to think						
31. Attending sporting events						
32. Attending symphony or concerts						
33. Telephone visiting						

	Frequency of Activity			Enjoyment of Activity		
	Often	Some-times	Never	Very Much	So-So	Dislike
34. Traveling or touring						
35. Using public library						
36. Visiting museums, art galleries, etc.						
37. Performing volunteer work--social service, etc.						
38. Writing personal letters						
39. Special hobbies: coin collecting, stamp collecting, etc.						
40. Photography						
41. Shop work						
42. Gardening						
43. Camping						
44. Fishing & hunting						
45. Boating						
46. Sewing						
47. Needlework, crochet, knitting, etc.						
48. Regular jogging						
49. Active sports (skiing, tennis, etc.)						
ANY OTHER MAJOR ACTIVITY NOT LISTED? 50. _____						
Number checked (total each column)						

PERSONAL RESOURCE INVENTORY

The following seven questions are concerned with your values, and with your resources for implementing and realizing those values. Try to develop as many answers as you can for each question.

1. When do I feel fully alive? What things and experiences make me feel that life is really worth living. . .that it is great to be me and to be alive?

2. What do I do well? In what matters am I skilled, effective, capable? What do I do well for my own growth and well-being? What do I do well for others?

3. Given my current situation, and given my plans and hopes, what do I need to learn to do?

4. What wishes should I be turning into plans? Any dreams I have discarded as "unrealistic" that I should start dreaming again?

5. What under-developed or misused resources do I have? (Resources might be material things, or talents, or friends, and so on.)

6. What should I start doing <u>now</u>?

7. What should I stop doing <u>now</u>?